

SAN FRANCISCO
EARLY CARE AND EDUCATION
2023 NEEDS ASSESSMENT

REPORT





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INTRODUCTION

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PURPOSE AND OVERVIEW OF NEEDS ASSESSMENT

The San Francisco Early Care and Education (ECE) Needs Assessment provides critical information for the county. This report goes beyond state data collection and reporting requirements and aims to provide an essential planning tool for early care and education (ECE) funders, policy makers, and the field. The information compiled in this report informs the ongoing efforts to improve supply, demand, and access to ECE services for all families, with a focus on low-income families and children in historically marginalized communities.

Extensive longitudinal research reports the positive outcomes for children participating in high-quality ECE programs: improved school performance, decreased need for special education, increased high school graduation rates, decreased crime rates, and increased earnings in adulthood. These findings are magnified for children of families at the lowest income levels. Children who receive high quality ECE are more likely to have advanced language, academic, and social skills.

The COVID-19 pandemic has highlighted how quality ECE is critical for families, employers, and the community at large. Access to quality ECE supports the economic success of families and San Francisco and is an important economic driver. In light of these important social and economic benefits, ensuring availability, affordability, and quality ECE is a priority.

METHODOLOGY

Data were collected from the U. S. Census, the American Community Survey, and local agencies. Sources are noted within the report.

OPERATIONAL DEFINITIONS

Age ranges - There are three primary age groups referred to within this report: infant-toddlers (0-2 years), preschoolers (3–5 years), and school-age (6-12 years old).

Capacity - The total number of children that may be present in an early care and education program at any one time.

Child Care Centers or ECE Centers - Programs that are licensed to provide group ECE services in a nonresidential setting.

- Less than 24-hour per day of non-medical care and supervision are provided to children in a group setting (CCR, Title 22, Section 101152).
- Can provide care for more than 14 children.
- Directors and teachers are required to have educational credits and experience.
- Care provided is less than 24 hours.
- City and/or county permits may be required.
- Fire clearance from the local fire authority is required.
- A business license may be required, depending on local requirements.





CHAPTER 1: THE PEOPLE OF SAN FRANCISCO

SAN FRANCISCO POPULATION SUMMARY

San Francisco is unique in that it is a city and a county with overlapping local, county, and state priorities and regulations. According to the U.S. Census, the estimated total population of San Francisco in 2020 was **873,965**.

There were **46,475 children ages 0-5** living in San Francisco in 2020. There were 21,131 3-5 years olds and 25,344 0-2 years olds according to American Community Survey (2020).

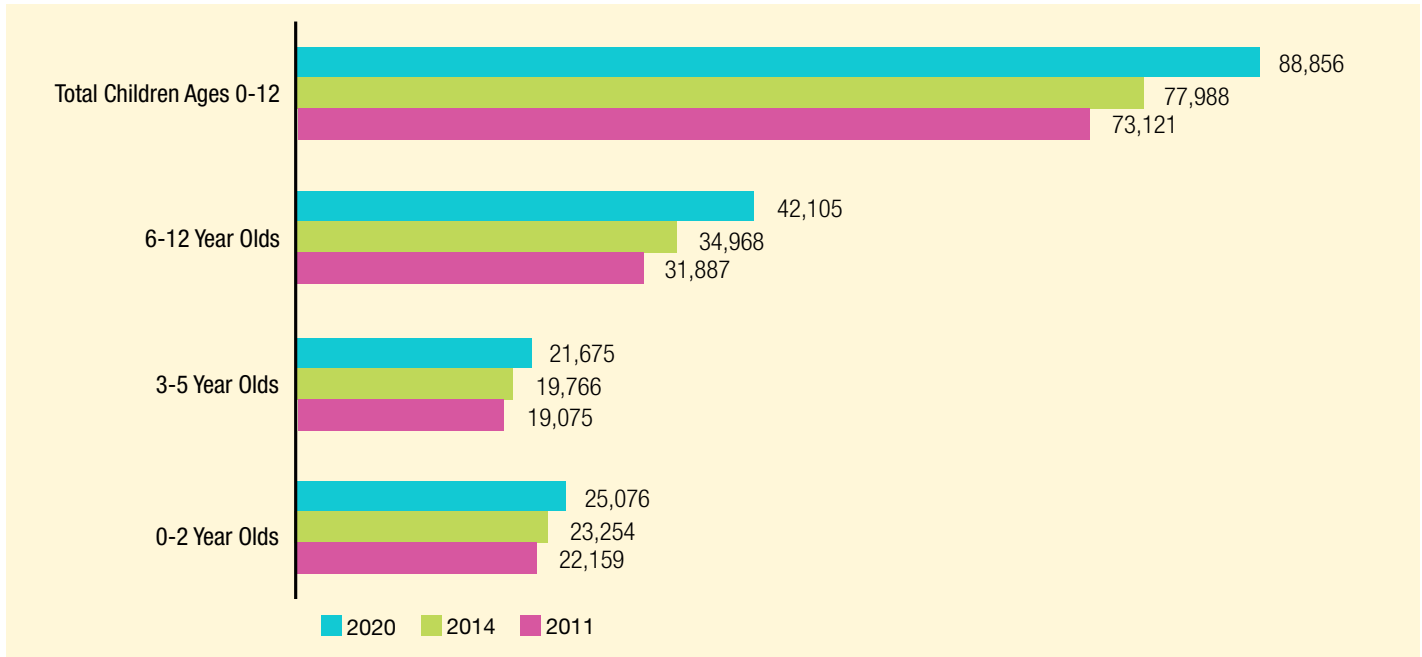
Children Ages 0-5 Make Up Less Than 5% Of The Total Population In San Francisco

Total population	873,965
Percent of residents under 5 years old	4.5%
Percent of residents under 18 years old	13.4%

U.S. Census Bureau (July 2020). QuickFacts Monterey County.
Retrieved from <https://www.census.gov/quickfacts/fact/table/sanfranciscocountycalifornia/POP815219#POP815219>



The Total Number Of Children Ages 0-12 Living In San Francisco Has Increased Over Time For Each Age Group



AIR analysis of American Community Survey 5-year estimates (2020).

A third (34%) of children 0 to 12 years old live in one of the following four zip codes: 94110, 94112, 94122, and 94134.



San Francisco Neighborhoods With The Most Children Ages 0-5

Neighborhood	Total Number of Children (ages 0-5)
Outer Mission / Excelsior / Ingleside (zip code 94112)	4,754
Inner Mission / Bernal Heights (zip code 94110)	4,339
Sunset (zip code 94122)	3,441
Polk / Russian Hill / Nob Hill (zip code 94109)	2,784

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds and 2018 for school age children)

Child population varies by age and region within San Francisco. The chart on the following page illustrates the variability of age groups by location.

The Number Of Children In San Francisco By Age And Zip Code

Zip Code	Neighborhood	0-2 year olds	3-5 year olds	6-12 year olds	Total 0-12 years old
94102	Hayes Valley / Tenderloin	1,015	898	1,214	3,127
94103	South of Market	876	815	1,054	2,745
94104	Financial District	11	12	13	36
94105	Downtown	177	183	196	556
94107	Potrero Hill	812	843	911	2,566
94108	Chinatown	374	228	459	1,061
94109	Polk / Russian Hill / Nob Hill	1,630	1,154	1,981	4,765
94110	Inner Mission / Bernal Heights	2,297	2,042	2,846	7,185
94111	Embarcadero /Gateway	96	50	120	266
94112	Outer Mission / Excelsior / Ingleside	2,219	2,535	5,683	10,437
94114	Castro / Noe Valley	1,093	864	1,546	3,503
94115	Western Addition	1,116	635	1,460	3,211
94116	Parkside / Forest Hill	1,324	1,293	2,685	5,302
94117	Haight / Western Addition / Fillmore	1,400	986	1,921	4,307
94118	Inner Richmond / Presidio / Laurel H.	1,404	816	1,859	4,079
94121	Outer Richmond / Sea Cliff	1,509	878	1,998	4,385
94122	Sunset	1,771	1,670	3,393	6,834
94123	Marina / Cow Hollow	608	319	761	1,688
94124	Bayview / Hunters Point	1,042	1,228	2,782	5,052
94127	West Portal / St. Francis Wood	492	553	1,236	2,281
94129	Presidio	116	67	153	336
94130	Treasure Island	77	39	96	212
94131	Twin Peaks / Diamond Heights / Glen Park	815	769	1,564	3,148
94132	Stonestown / Lake Merced	715	809	1,809	3,333
94133	North Beach / Telegraph Hill	693	364	867	1,924
94134	Visitacion Valley	1,249	1,474	3,337	6,060
94158	Mission Bay	145	151	161	457
	Total Number of Children per age group	25,076	21,675	42,105	88,856

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds and 2018 for school age children)

RACE AND ETHNICITY

The ethnic composition of San Francisco’s children represents rich diversity. The majority of children (ages 0-12 years old) living in San Francisco are classified as either White, Not Hispanic (30.7%), Asian American (22.7%), or Hispanic or Latino (22.2%). There are more younger children (ages 0-5 years old) that are White, Not Hispanic (32.9%) compared to older children (ages 6-12 years old) 28.2%.

The Number And Percentage Of Children Ages 0-5 By Race/Ethnicity And Age

Race/Ethnicity	Total Number of Children (ages 0-5)	Percent
African American / Black	2,074	4.2%
American Indian or Alaskan Native	212	0.4%
Asian American	9,968	20.0%
Filipino	1,046	2.1%
Hispanic or Latino	10,737	21.6%
Multiracial/Ethnic	5,997	12.1%
White, Not Hispanic	16,354	32.9%
Other	358	0.7%
Total	49,749	

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds)

LANGUAGES SPOKEN BY CHILDREN

41% Of San Francisco Children Ages 0-5 Experience Languages Other Than English Spoken At Home

English Only	59%
Spanish	10%
Asian/Pacific Island Languages	25%
Another Language	6%

2019 San Francisco Child Care Portfolio is produced by the California Child Care Resource & Referral Network

Many young children are surrounded by languages other than English, which creates a demand for ECE staff to be bilingual. The percent of ECE centers in San Francisco that report having at least one staff member who speaks English is 99%, Spanish: 43%, Chinese: 38%, Tagalog: 6%, Vietnamese: 6%, Japanese: 2%, and other languages: 9%. Similarly, the percent of FCC programs that report having at least one staff member who speaks English is 86%, Chinese: 36%, Spanish: 25%, Russian: 6%, French: 2%, Arabic: 1%, and other languages: 6% (2019 San Francisco Child Care Portfolio, California Child Care Resource & Referral Network).

Children who speak a language other than English often graduate out of English Language Learner programs as they get older so it is normal to see a decrease in the percent of grade school children who are not English proficient. Approximately a quarter (27.5%) of San Francisco Unified students (total of all grades) are English Language Learners (according to CA School Dashboard, 2022) compared to 24.4% in 2021, 28.5% in 2020, 28.6% in 2019, and 29.3% in 2018.

HOUSEHOLD STRUCTURES

Today’s families come in many shapes and sizes. Some have one, two, or more adult caregivers some of which may be parents/guardians, grandparents, or other caretakers. In 2018, 71.2% of San Francisco children were living in households with two parents present compared to 63.7% of children in California. However, nearly one third of San Francisco children live in a household with either one or no parents present (U.S. Census Bureau American Community Survey (2019) retrieved from Kidsdata.org).

The Majority Of Children Ages 0-17 Live In Households With Two Adults In San Francisco

San Francisco County	Percent
Two Parents Present	71.2%
Mother Present Only	17.6%
Father Present Only	6.6%
No Parents Present; Other Relatives Present	3.5%
No Parents or Other Relatives Present	1.2%

kidsdata.org, Population Reference Bureau, analysis of U.S. Census Bureau American Community Survey (2019)



CHAPTER 1 CRITICAL FINDINGS

- According to the [U.S. Census](#), the estimated total population of San Francisco in 2020 was 873,965, an increase of 2% since 2016.
- There were **46,475 children ages 0-5** living in San Francisco in 2020. Child population varies by age and neighborhood within San Francisco. A third (34%) of San Francisco children live in one of these four zip codes: 94112, 94110, 94122, and 94134.
- Less than half (41%) of all children ages 0-5 experience languages other than English spoken at home. Due to the diversity of languages spoken in San Francisco there is a demand for ECE staff to be bilingual.
- Nearly one-third of San Francisco children live in a household with either one or no parents present.



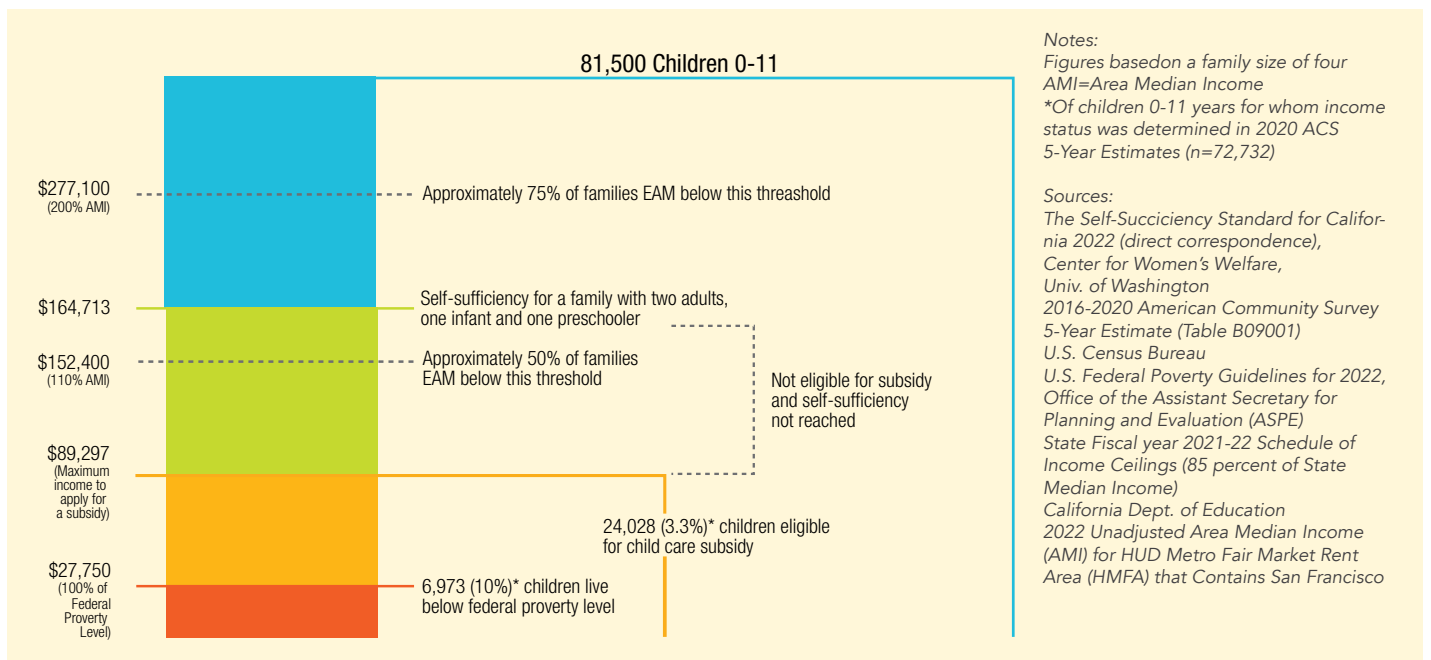
CHAPTER 2: COST OF LIVING

COST OF LIVING IN SAN FRANCISCO

San Francisco is a high cost county. The median household income in San Francisco was \$126,187 in 2021 according to the [U.S. Census](#).

The self-sufficiency standard, or the minimum income necessary to cover all of a family’s basic expenses (based on a two adult family with two children) - housing, food, child care, health care, transportation, and taxes - without public or private assistance, is more than **6 times** the federal poverty level. The self-sufficiency standard is also higher than the maximum income for ECE subsidy eligibility. Many children in San Francisco live in families that are not making enough money to be self-sufficient, and yet these children do not qualify for ECE subsidies as illustrated in the following chart.

Household Income Distribution Related To The Cost Of Early Care And Education In San Francisco



Based on a family of four (2 adults, 1 infant/toddler, and 1 preschooler), the household annual income needed to make ends meet in San Francisco is **\$164,713**. This requires **both adults** to earn at least **\$38.99/hour** and to work full time. The following chart illustrates the monthly cost of living in San Francisco for a family of four based on the Family Needs Calculator for California.



Monthly Cost Of Living In San Francisco For A Family Of Four

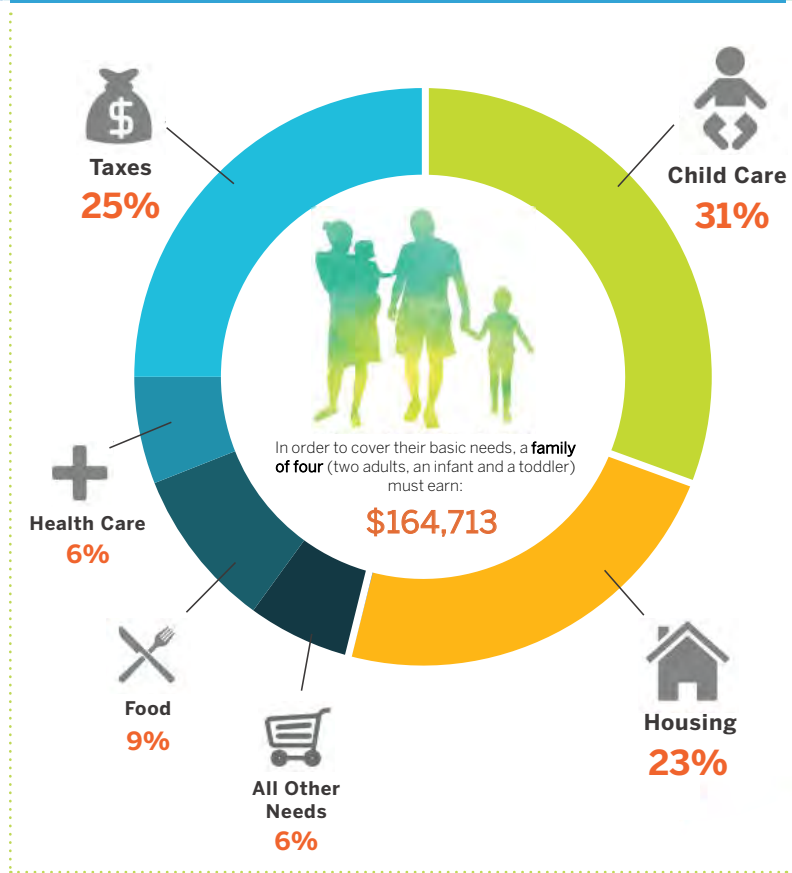
Monthly Costs	
Housing	\$3,184
Child Care	\$4,204
Food	\$1,186
Transportation	\$196
Health Care	\$834
Miscellaneous	\$960
Taxes	\$3,594
Earned Income Tax Credit (-)	\$0
Child Care Tax Credit (-)	(\$100)
Child Tax Credit (-)	(\$333)
Self-Sufficiency Wage	
Hourly	\$38.99
Monthly	\$13,726
Annual	\$164,713
Emergency Savings Fund (Monthly Contribution)	\$358

2019 The Self-Sufficiency Standard for California 2022 (direct correspondence), Center for Women's Welfare, University of Washington San Francisco Child Care Portfolio is produced by the California Child Care Resource & Referral Network

POVERTY

[US Census 2021](#) estimates that 10.1% of San Francisco residents compared to 11.5% of California residents live in poverty. However, the [California Poverty Measure \(CPM\)](#) estimates that 17.0% of San Francisco residents and 18.6% of local children (ages 0-17) are living in poverty. The child poverty rate is increasing and San Francisco’s child poverty rate is among the top ten highest counties in the state.

The percent of students eligible for free or reduced-price lunch is another indicator of the economic challenges local families face. According to the [CA School Dashboard](#), in 2022, 52.3% of San Francisco Unified students were classified as socioeconomically disadvantaged (defined as students who are eligible for free or reduced priced meals; or have parents/guardians who did not receive a high school diploma).



Estimates of the number of children ages 3-5 years old who are eligible for free and reduced meals are made by AIR estimates from California Department of Education (CDE) data, Student Poverty Free and Reduced Price Meals (FRPM) Data based on kindergarten enrollment. In 2018, AIR estimated there were 8,082 3-5 year olds in San Francisco who were eligible for free and reduced meals. This number went down in 2020 to 6,738 however that is likely due to the impact of the pandemic, and not an indication of a downward trend.

Although 9.2% of families with children 0-12 years old are living at or below federal poverty level, nearly a quarter (24.4%) of families with children 0-12 years old earn under 85% the state median income (SMI), which is still significantly below the self-sufficiency income needed to maintain the cost of living in San Francisco.

Many SF Families Are Earning Below SMI And FPL Making It Difficult To Make Ends Meet

	Percent of families with children living under 100% FPL	Percent of families with children living under 85% State Median Income
0-2 years	6.4%	18.2 %
3-5 years	10.1%	22.4%
6-12 years	10.4%	29.2%
0-12 years	9.2%	24.4%

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds and 2018 for school age children)

¹CPM is based on calculations from the California samples of the American Community Survey, along with a number of other auxiliary data sources. The CPM is a joint research effort between PPIC and the Stanford Center on Poverty and Inequality that, unlike the official poverty measure developed by the US Census Bureau, takes into account the cost of living and resources from social safety net programs.

See Appendices A and B for a breakdown of zip codes where there are a greater number of children living below 85% SMI and under 100% FPL, by age.

San Francisco helps low-income families afford child care through a variety of federal, state, and local programs. To qualify for most state subsidies, a family must earn less than 85% of the SMI. For CSPP a family can earn up to 100% of SMI. Local subsidy eligibility is based on household income at or below 110% Area Median Income. Subsidies may be public or private financial assistance in the form of vouchers or direct contracts which subsidize the cost for care to providers on behalf of eligible families. Private financial assistance, often offered to families as a scholarship, is not captured in this report.



CHAPTER 2 CRITICAL FINDINGS

- San Francisco is a high cost county. The median household income in San Francisco was \$119,136 in 2020 according to the [U.S. Census](#).
- The self-sufficiency standard, or the minimum income necessary to cover all of a family's basic expenses (based on a two adult family with two children) is more than 6 times the federal poverty level. The annual household income needed to make ends meet in San Francisco is \$164,713. This requires both adults to earn at least \$38.99/hour and to work full time.
- [US Census 2021](#) estimates that 10.1% of San Francisco residents live in poverty. However, the [California Poverty Measure \(CPM\)](#) estimates that 17.0% of San Francisco residents and 18.6% of local children (ages 0-17) are living in poverty.

²As of July 2022 CSPP income eligibility ceiling increased to 100% SMI.



CHAPTER 3: COST OF CARE

COST OF CARE

The average cost of care in San Francisco is prohibitive for many families. Now more than ever, families need help paying for care and providers need financial support to recover from the COVID-19 pandemic.

- The cost of care is highest for infants/toddlers in center-based ECE settings.
- Fifty percent of licensed centers charge more than **\$27,600/year** and 50% of FCCs charge more than **\$22,200/year** for infant/toddler care.
- The annual cost of care is slightly less for preschoolers: 50% of centers charge more than **\$20,370/year** and 50% of FCCs charge more than **\$21,234/year** for preschool care.
- On the high end, licensed child care centers charge up to **\$36,588/year** for infant/toddler care and **\$28,598/year** for preschool care compared to **\$30,000/year** for infant/toddler care and **\$27,342/year** for preschool care in FCC programs.

The following average tuition rates are for full-time care (30 hours or more per week), in licensed centers and FCC programs, for infants/toddlers (0-2 years old) and preschoolers (3-5 years old).

Monthly Cost Of Care		
	Infant/Toddler Care	Preschool Care
50% of centers charge this monthly tuition or more	\$2,300	\$1,698
50% of FCC programs charge this monthly tuition or more	\$1,850	\$1,770

Source: Children’s Council of San Francisco (2022)

REGIONAL MARKET RATE CEILINGS

Every two years, the CDSS conducts a Child Care/Early Education Market Rate Survey. The results determine the Regional Market Rate (RMR), the maximum rates that can be paid to child care providers/early education programs serving children in subsidy programs. Although the RMR is based on the 75th percentile of the cost

of care in 2018, the reimbursement rate is significantly lower than what local providers report charging for care in 2022. The following charts illustrate how the maximum monthly RMR for centers and FCCs allowed for by State subsidies are lower than what the 75% of programs charge for monthly tuition.

RMR Compared To The Tuition Rate 75% Of ECE Programs Charge

Centers	Infants/Toddlers	Preschoolers
75% of centers charge this monthly tuition or less	\$2,672	\$2,094
RMR center reimbursement monthly rate	\$2,195	\$1,744

<https://rcsc.adm.dss.ca.gov/index.aspx> and Children's Council of San Francisco (2022)

FCC Programs	Infants/Toddlers	Preschoolers
75% of FCC programs charge this monthly tuition or less	\$2,200	\$2,000
RMR center reimbursement monthly rate	100	100



CHAPTER 3 CRITICAL FINDINGS

- The average cost of care in San Francisco is prohibitive for many families. Now more than ever, families need help paying for care and providers need financial support to recover from the COVID-19 pandemic.
- State reimbursement rates do not cover the true cost of care.
- The cost of care is highest for infants/toddlers in center-based ECE settings.
- On average families in San Francisco will pay between \$22,000 to \$28,000 for a year of child care for their infant and about \$21,000 a year for their preschooler.
 - Fifty percent of licensed centers charge more than **\$27,600/year** and 50% of FCCs charge more than **\$22,200/year** for infant/toddler care.
 - The annual cost of care is slightly less for preschoolers: 50% of centers charge more than **\$20,370/year** and 50% of FCCs charge more than **\$21,234/year** for preschool care.
 - On the high end, licensed child care centers charge up to **\$36,588/year** for infant/toddler care and **\$28,598/year** for preschool care compared to **\$30,000/year** for infant/toddler care and **\$27,342/year** for preschool care in FCC programs.



CHAPTER 4: ECE LICENSE CAPACITY

License capacity is the maximum number of children an ECE program can care for at one time. Licensed centers receive licenses to serve specific numbers of children in different age groups (infant, preschooler, or school age). FCC programs receive licenses for a small FCC (serving 6-8 children of mixed ages) or a large FCC (serving 12-14 children of mixed ages). The ages of children served in FCC programs are often fluid, as the license is not for a particular age.

License capacity is typically not an accurate reflection of operational capacity nor an accurate indication of how many children are enrolled. Some experts suggest that a well-run program can operate at 95% of its license capacity; however, the industry standard is closer to 85%. Many programs under-enroll their full license capacity by choice in order to maintain a higher quality teacher to child ratio. Others under-enroll due to quality considerations, staff and/or funding availability, space constraints, and based on the age of the children served. Under-enrollment was particularly evident when programs were mandated to follow small cohort pandemic guidelines. Local licensed centers report that their desired infant capacity is approximately three-quarters of their license capacity while their desired preschool capacity is just under 90%.

Additionally, not all families need full-time care; as a result, many ECE slots may be “shared” by families. Some children attend more than one type of care (e.g., a half-day at a FCC program and half day at a center-based preschool). For this reason, some providers who are licensed for 8 or 14 children may serve as many as 20 in a week. In other cases, programs may extend operating hours to serve more children in a given week. All of these factors impact the true availability of child care. This report defines supply based on license capacity for children ages 0-5 years old.

Although families of school age children need care for out-of-school time (OST) this Needs Assessment does not address this age group. The San Francisco Department of Children, Youth and Their Families (DCYF) provides funding to support out-of-school time and beyond and recently published a comprehensive [Community Needs Assessment](#) that details the demographics and characteristics of children, youth, and transitional age youth in San Francisco.



The following section details the license capacity in center-based programs and FCCs including a discussion about historic trends.

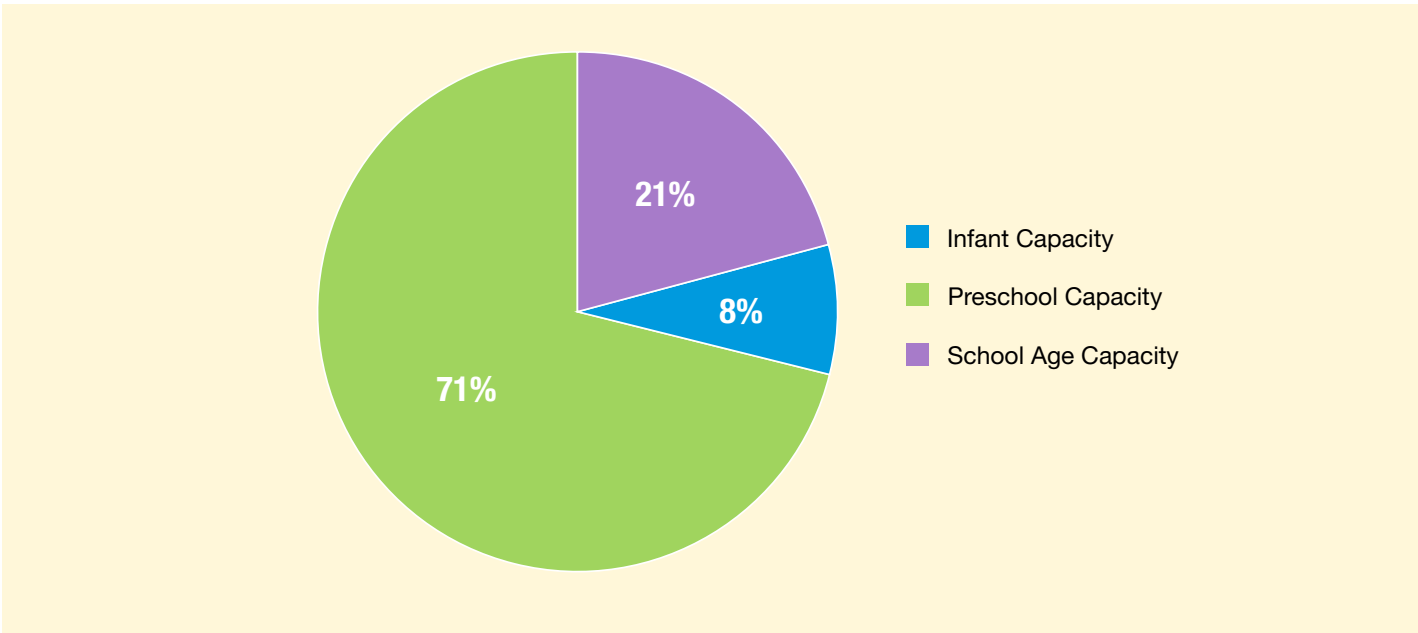
CENTER LICENSE CAPACITY

There are a total of **23,646 licensed center spaces** for children in San Francisco County. The following chart details this capacity by age and zip code.

Zip Code	Neighborhood	Center Infant License Capacity	Center Preschool License Capacity	Center School Age License Capacity	Total Center License Capacity
94102	Hayes Valley / Tenderloin	127	733	81	941
94103	South of Market	211	926	71	1,208
94104	Financial District	10	12	14	36
94105	Downtown	134	313	0	447
94107	Potrero Hill	78	714	12	804
94108	Chinatown	0	380	0	380
94109	Polk / Russian Hill / Nob Hill	8	415	0	423
94110	Inner Mission / Bernal Heights	146	1,535	90	1,771
94111	Embarcadero / Gateway	94	190	0	284
94112	Outer Mission / Excelsior / Ingleside	44	762	268	1,074
94114	Castro/ Noe Valley	32	356	0	388
94115	Western Addition	18	1,151	145	1,314
94116	Parkside / Forest Hill	92	972	728	1,792
94117	Haight / Western Addition / Fillmore	28	674	1071	1,773
94118	Inner Richmond / Presidio / Laurel H.	138	1,291	130	1,559
94121	Outer Richmond / Sea Cliff	40	558	400	998
94122	Sunset	0	988	488	1,476
94123	Marina / Cow Hollow	32	287	0	319
94124	Bayview / Hunters Point	140	972	258	1,370
94127	West Portal / St. Francis Wood	0	216	500	716
94129	Presidio	70	471	75	616
94130	Treasure Island	21	60	0	81
94131	Twin Peaks / Diamond Heights / Glen Park	39	294	360	693
94132	Stonestown / Lake Merced	99	762	111	972
94133	North Beach / Telegraph Hill	62	349	110	521
94134	Visitacion Valley	60	998	110	1,168
94143	UCSF	30	93	0	123
94158	Mission Bay	99	300	0	399
	Total	1,852	16,772	5,022	23,646

A closer look at the ages served by licensed centers illustrates that 71% of the spaces are for preschool age children.

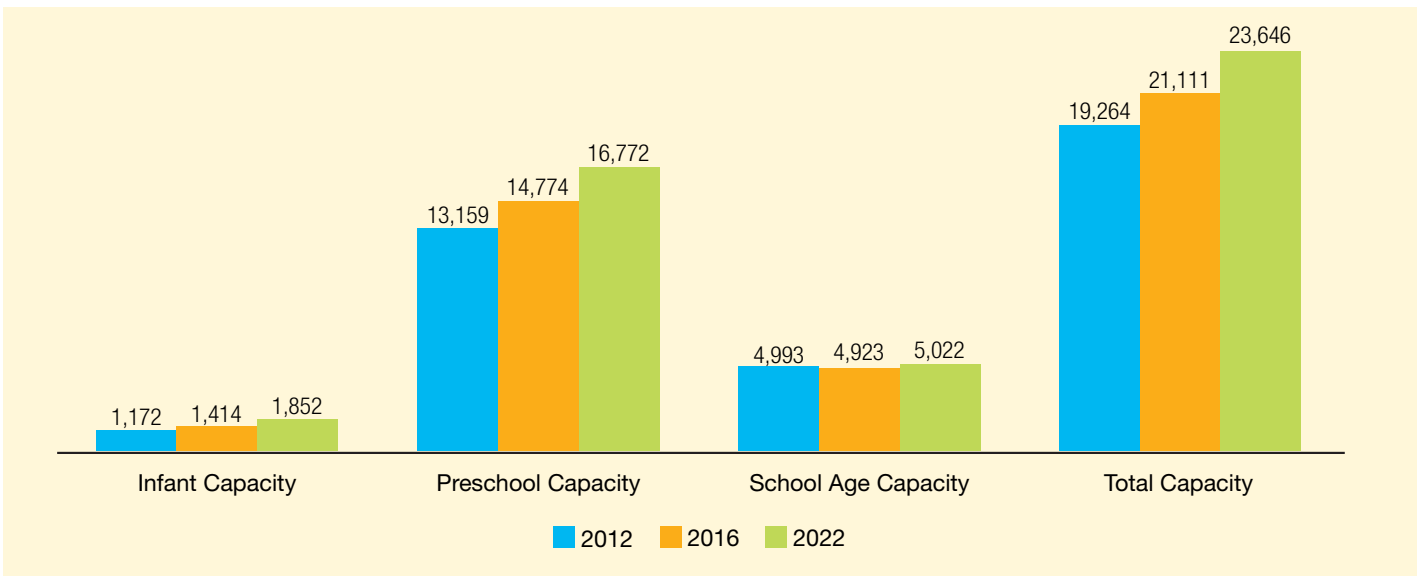
The Majority (71%) Of The Licensed Center Spaces Are For Preschool Age Children



The majority (71%) of the licensed center spaces are for preschool age children

Due to successful local expansion efforts there has been a steady increase in the number of licensed center-based spaces, particularly among preschool age children (+1,998 spaces) and infants (+438 spaces) since 2016. There are **2,535** more licensed center-based spaces now compared to 2016.

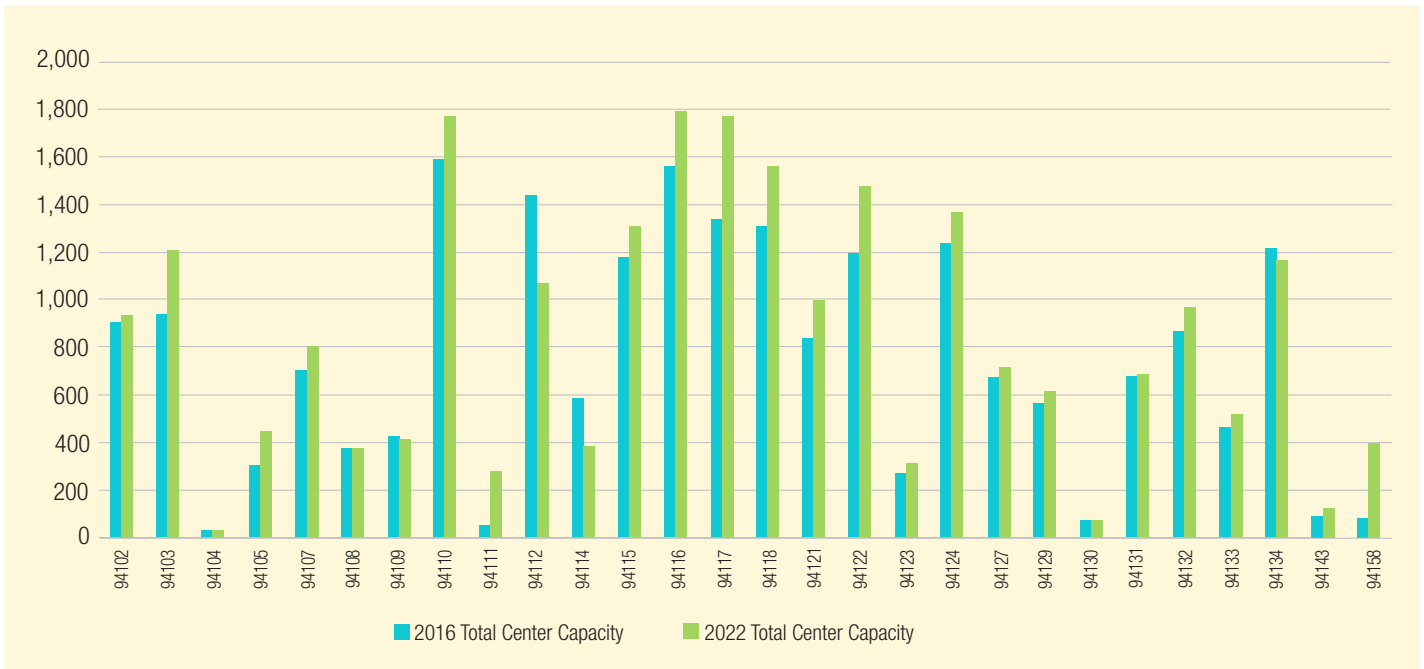
Center License Capacity Has Increased In All Age Groups Over Time



Source: Children’s Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

Zip codes with the greatest gains in licensed center capacity were: 94117 (+436 spaces), 94158 (+313 spaces), 94122 (+276 spaces), and 94103 (+270 spaces). Zip codes with the greatest decline in spaces were: 94112 (-367 spaces) and 94114 (-205 spaces). The following chart illustrates which zip codes experienced a gain or loss in total licensed center capacity from 2016 to 2022.

Licensed Center Capacity Has Increased In Most Zip Codes Since 2016



Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

FAMILY CHILD CARE LICENSE CAPACITY

FCCs are classified as small or large, based on how many children they are licensed to serve. Small FCCs can care for up to 6 or 8 children, depending on their license and the ages of children served. Large FCCs can care for up to 12 or 14 children, again depending on their license and other conditions, such as how many infants are in care. Small FCCs are required to have at least one adult educator taking care of the children, while large FCCs must at minimum have a second adult / assistant present in order to maintain the required adult-child ratio. Many small FCCs have a part time assistant, and many large FCCs have more than one assistant.

There are **7,570 licensed FCC spaces** in San Francisco. However, similar to licensed centers, FCC license capacity is often not reflective of the program's desired capacity. Small FCCs report that their desired or preferred enrollment is approximately 81% of their license capacity and large FCCs report their desired enrollment is 88% of their license capacity (Children's Council of San Francisco, September 2022).



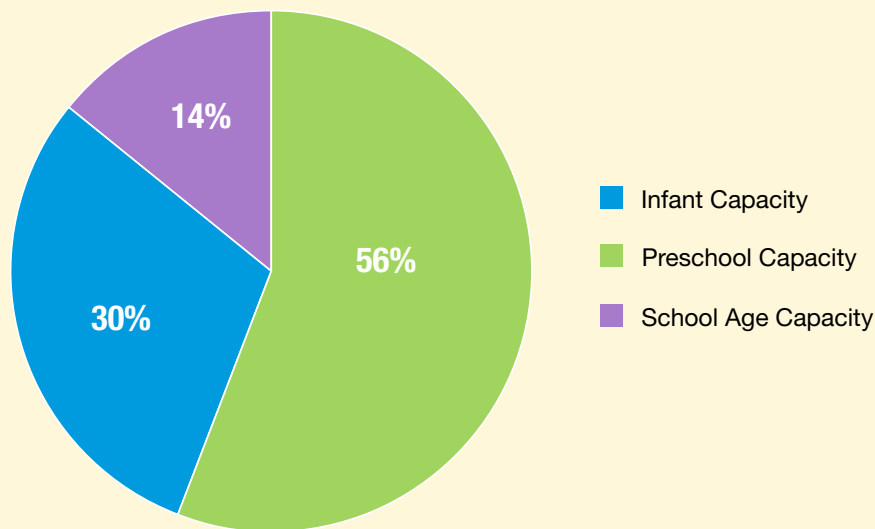
Licensed FCC Capacity By Zip Code

Zip Code	Neighborhood	Small FCC License Capacity	Large FCC License Capacity	Total FCC License Capacity
94102	Hayes Valley / Tenderloin	70	22	92
94103	South of Market	160	0	160
94105	Downtown	70	0	70
94107	Potrero Hill	184	0	184
94108	Chinatown	72	14	86
94109	Polk / Russian Hill / Nob Hill	56	14	70
94110	Inner Mission / Bernal Heights	568	194	762
94111	Embarcadero / Gateway	16	0	16
94112	Outer Mission / Excelsior / Ingelside	894	706	1,600
94114	Castro/ Noe Valley	64	28	92
94115	Western Addition	120	28	148
94116	Parkside / Forest Hill	304	294	598
94117	Haight / Western Addition / Fillmore	54	54	108
94118	Inner Richmond / Presidio / Laurel H.	144	168	312
94121	Outer Richmond / Sea Cliff	238	222	460
94122	Sunset	288	252	540
94123	Marina / Cow Hollow	56	56	112
94124	Bayview / Hunters Point	406	140	546
94127	West Portal / St. Francis Wood	88	98	186
94131	Twin Peaks / Diamond Heights / Glen Park	118	84	202
94132	Stonestown / Lake Merced	168	56	224
94133	North Beach / Telegraph Hill	112	42	154
94134	Visitacion Valley	408	264	672
94158	Mission Bay	176	0	176
	Total	4,834	2,736	7,570

Note: Zip codes without associated data were removed for the table.

Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

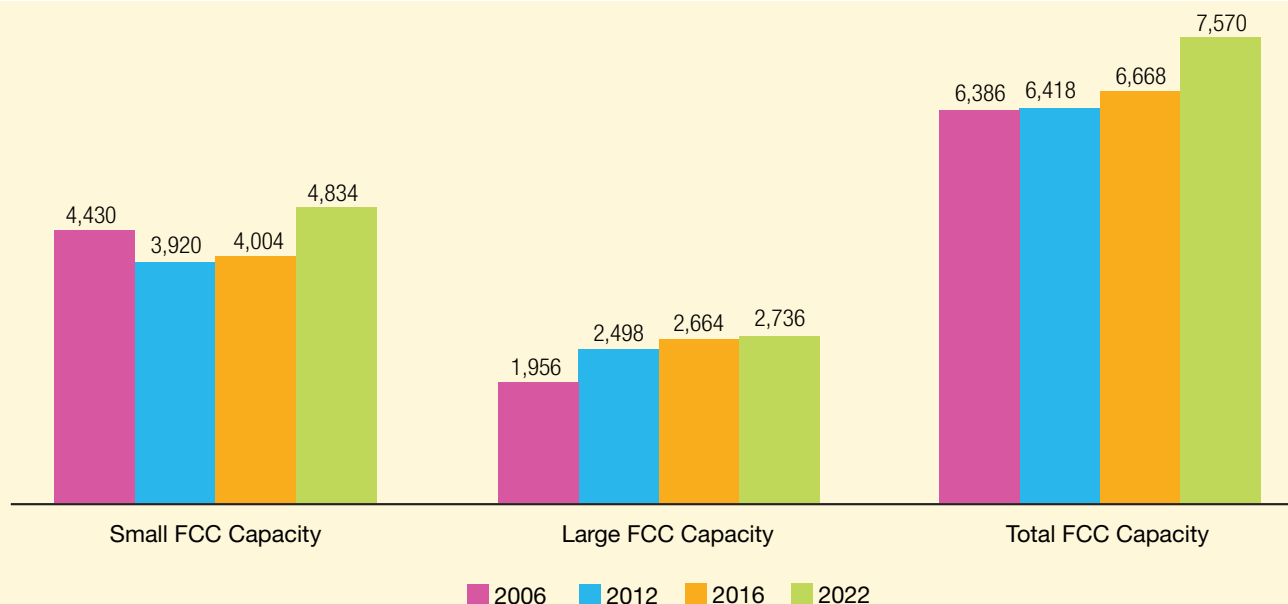
Estimated Age Ranges Of Children Served By FCC Programs



Source: Children's Council of San Francisco (September 2022)

Due to successful local expansion efforts there has been a significant increase in the number of licensed small FCC spaces **(+830 spaces)** since 2016. This increase surpasses the previous 2006 number of licensed small FCC spaces. There was also an increase in large FCC spaces **(+72 spaces)** since 2016. There are 902 more licensed FCC spaces now compared to 2016.

FCC Capacity Has Increased Over Time With Recent Gains In Small FCC Capacity



Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

Zip codes with the greatest gain in licensed FCC spaces are: 94112 (+298 spaces), 94134 (+192 spaces), 94158 (+160 spaces), and 94110 (+124 spaces). There was a noteworthy loss of licensed FCC spaces in zip code 94122 (-148 spaces).

Historic Comparison Of FCC Capacity By Zip Code

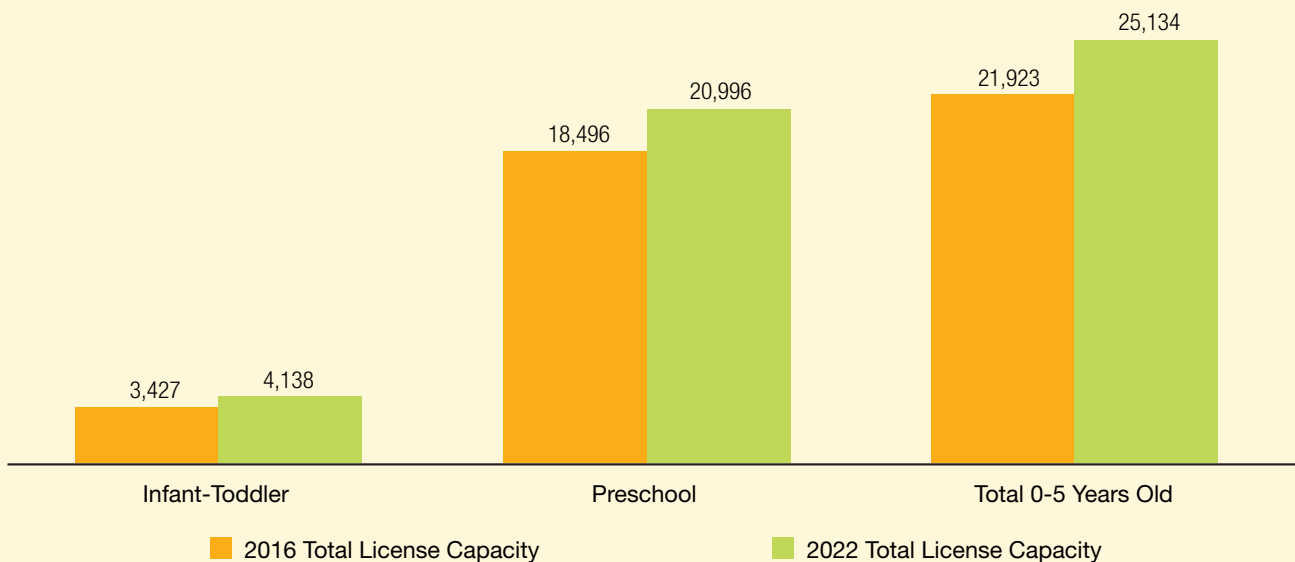


Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

TOTAL LICENSE CAPACITY

The total license capacity in center-based and FCC programs has increased from 2016 to 2022, with the most notable increase in spaces for preschool age children (net gain of 2,500 license spaces for preschool age children).

Total License Capacity Has Increased From 2016 To 2022



Note: The 6-12 age range is not included in this section because license care is not the primary care solution for this age group. 2022 preschool capacity total does not include the 670 TK spaces because TK was not factored into the preschool capacity total in 2016.

Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

NEED VERSUS CAPACITY

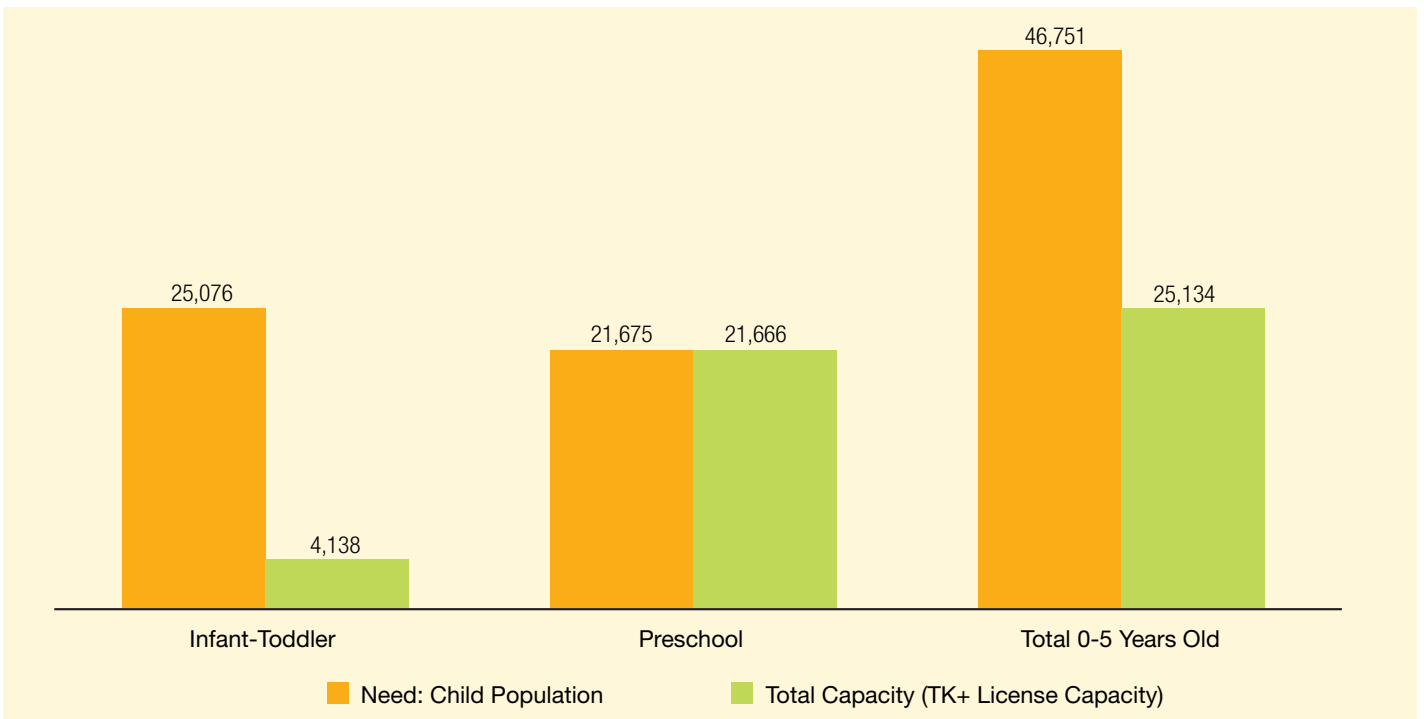
Child population is used as a proxy for need in this report although it is understood that not all children need care. The demand for care increases as children get older. When the number of children in the total population for each age group is compared to the number of licensed spaces the greatest need for care is for infant/toddler spaces. The total available capacity (the number of licensed child care and TK spaces) meets 16.5% of the need for infants/toddlers and nearly 100% of the need for preschool age children. A breakdown of the total license capacity for all programs compared to the number of children ages 0-2 years old and 3-5 years old by zip code is presented in Appendices C and D.

Overall, the need is met for 55.2% of children ages 0-5 in San Francisco. This is a slight increase from 2016 (51.0% need met for children ages 0-5; 14.7% met for infants/toddlers, 93.6% met for preschoolers).

Need Versus Capacity					
	Need	Capacity	Met Need	Unmet Need	
	Child Population	Total TK + License Capacity	% of Population with License +TK Slots	Unmet Need	Difference in Population vs Capacity
Infants-Toddlers	25,076	4,138	16.5%	83.5%	20,938
Preschoolers	21,675	21,666	100%	0.4%	9
Total 0-5 year olds	46,751	25,134	55.2%	44.8%	21,617

Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data

There Is A Greater Need For Care Compared To The Current Capacity, Especially Among Infant/Toddlers



Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data



CHAPTER 4 CRITICAL FINDINGS

- There are a total of **23,646** licensed spaces in centers and **7,570** spaces in licensed FCC for children in San Francisco.
- While the state of California saw a decline in license capacity over the last 5 years, San Francisco has seen a **14.7% increase in licensed child care capacity**.
- There is enough preschool capacity to meet 100% of this age group.
- There is enough licensed infant toddler capacity to meet 16.5% of this age group. Overall, there are enough licensed spaces for approximately half of the children ages 0-5 in San Francisco



CHAPTER 5: SUBSIDIZED CARE

SUBSIDY OVERVIEW

Our early learning system includes multiple public funding sources for early care education. This section identifies the number of subsidized spaces in each of the subsidized programs including Title 5, California Alternative Payment Program (APP), Family Child Care Home Education Network (FCCHEN), CalWORKs and CalLearn, Head Start and Early Head Start, San Francisco Human Services Agency Family and Children’s Services (HSA-FCS), Transitional Kindergarten, Preschool for All, Early Learning San Francisco (ELS), and Early Care and Education for Children Experiencing Homelessness. This report identifies local zip codes with the greatest number of subsidy-eligible children not receiving subsidies in order to deepen the understanding of where resources are most needed.

ECE subsidy programs have differing and complex criteria regarding family need for care, initial enrollment, and continued eligibility. These complexities can make it difficult for families to navigate and maintain subsidies. The San Francisco Child Care Planning and Advisory Council (CPAC), Department of Early Childhood (DEC), and the Resource and Referral Agencies (R&Rs) work together to address ways to simplify the complex system of subsidies to increase access to care, optimize the number of families that benefit from ECE subsidies, and address subsidy gaps.

SUBSIDIZED ELIGIBILITY CRITERIA

A family qualifies for subsidies either through income eligibility and/or demonstrated need such as employment, homelessness, CalWORKs participation, or foster care.

BRAIDED OR STACKED SPACES

One subsidized ECE space may be funded by multiple sources in order to increase access to and participation in full-day or full-year ECE programs. This is referred to as stacked, layered, blended, or braided funding. Organizations operating these programs must maintain compliance with various federal, state, or local program requirements. Since some funding streams are combined, the number of subsidies does not equate to the number of children receiving subsidies. When possible, this report notes stacked and unstacked numbers of children receiving subsidies, and counts of unique children served.



TYPE OF SUBSIDIES

California's ECE subsidy programs are either direct contract subsidies or voucher-based subsidies. The portability of the funding (whether the subsidy stays at a particular program or stays with a particular child) and the settings in which the subsidy can be used set these two types of subsidies apart.

- **Direct contract subsidies** are attached to a specific facility/program, including licensed centers and FCCs through Family Child Care Home Education Networks (FCCHEN). ECE programs contract with the CDE or CDSS for a certain number of subsidized slots. Once a family has a subsidized slot at a particular program, they must stay at that program in order to keep that direct contract subsidy. Title 5 agencies are eligible to contract with the state for several funding contract types, such as with CDE for the California State Preschool Program (CSPP), and with CDSS for the General Child Care and Development Program (CCTR), and Children with Severe Disabilities (CHAN) Program.
- **Voucher subsidies**, administered by CDSS, allow families to choose among eligible ECE providers, including licensed early education centers, licensed FCCs, and license-exempt care, which includes family, friends, and neighbors, as well as some public recreation programs. Families must find an eligible provider, and have the hours of care and payment rate approved before their ECE subsidy is certified. Once certified, the child may start care, and payment is usually made directly to the provider by the contractor administering the subsidy. Voucher-based subsidies include CalWORKs Stages 1, 2, and 3, as well as Alternative Payment Programs (APPs).

A typical sample month of enrollment (March 2022) was used when possible to provide a consistent comparison across subsidized programs.

TITLE 5 CONTRACTED CENTERS

Title 5 contractors offer ECE services through center-based CDE and/or CDSS funded contracts. Title 5 contracts require programs to meet staffing, curriculum, assessment, and quality standards. Care is provided by a combination of both public and non-profit centers. San Francisco Unified School District is the single largest provider of Title 5 center-based ECE. Title 5 center contracts often anchor providers in low-income, marginalized communities, thus increasing access to care for families in those neighborhoods.

There has been a decrease in enrollment in Title 5 programs since the previous Needs Assessment (see Appendix E), through both General Child Care (CCTR) and California State Preschool Program (CSPP) contracts. This drop may have been influenced by several contributing factors, including the following:

- The COVID-19 pandemic - The pandemic created significant disruptions to families' access and preferences regarding ECE. COVID-19 health and safety protocols created school closures and smaller group sizes, which resulted in a drop in enrollment.
- Family reluctance and preferences - Families have been slow to return to some ECE programs, which has been particularly pronounced among families with infants and toddlers.

- Staff shortages - Insufficient ECE staffing limited the number of open classrooms and availability of care.
- The 'hold harmless' policy for contract reimbursement during the pandemic from state agencies, CDE and CDSS - Title 5 direct service contractors continue to be reimbursed 100% of the contract maximum reimbursable amount or net reimbursable program costs, whichever is less, regardless of attendance, if they meet either of the following requirements.
 - The program is open and operating in accordance with their approved program calendar and remains open and offers services throughout the program year.
 - The program is closed by local or state public health order or guidance due to the COVID-19 pandemic.

This creates a safety net for programs so they can stay open while operating at significantly lower enrollment rates.

- Quality efforts - Some programs prefer to maintain lower enrollment rates in order to offer higher quality care.
- Families are leaving San Francisco due to the high cost of living among other reasons including desires for more living space, less commuting, and different qualities in neighborhoods and schools. ECE programs are reporting increased rates of children not re-enrolling due to the family moving out of the area.
- Expansion of the additional option of Transitional Kindergarten for families with 4 year olds

The chart on the following page depicts the number of children enrolled in Title 5 programs based on data collected in April 2022. Approximately 38% were enrolled in SFUSD programs and 62% were enrolled in other programs.



Number Of Children Enrolled In Subsidized CDE/CDSS Title 5 Contracted Centers By Age

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	25	72	97
94103	South of Market	19	161	180
94104	Financial District	0	0	0
94105	Downtown	0	5	5
94107	Potrero Hill	4	91	95
94108	Chinatown	19	182	201
94109	Polk / Russian Hill / Nob Hill	0	53	53
94110	Inner Mission / Bernal Heights	104	422	526
94111	Embarcadero / Gateway	19	25	44
94112	Outer Mission / Excelsior / Ingleside	50	267	317
94114	Castro / Noe Valley	2	46	48
94115	Western Addition	30	194	224
94116	Parkside / Forest Hill	7	41	48
94117	Haight / Western Addition / Fillmore	8	26	34
94118	Inner Richmond / Presidio / Laurel H.	0	30	30
94121	Outer Richmond / Sea Cliff	24	51	75
94122	Sunset	4	108	112
94123	Marina / Cow Hollow	0	19	19
94124	Bayview / Hunters Point	98	301	399
94127	West Portal / St. Francis Wood	0	0	0
94129	Presidio	2	18	20
94130	Treasure Island	2	5	7
94131	Twin Peaks / Diamond Heights / Glen Park	0	39	39
94132	Stonestown / Lake Merced	15	67	82
94133	North Beach / Telegraph Hill	49	122	171
94134	Visitacion Valley	107	156	263
94158	Mission Bay	1	1	2
	Total	589	2,502	3,091

CCTR data (ages 0-2 years old) retrieved from Indigo Project, April 2022

CSPP data (ages 3-5 years old) retrieved from Early Education Division, California Department of Education, April 2022

FAMILY CHILD HOME EDUCATION NETWORK

Direct contract subsidies offer care for eligible families at specific ECE programs, including licensed centers and FCCs through Family Child Care Home Education Networks (FCCHEN). The following chart details only the zip codes where there are children with FCCHEN subsidies.

Number Of Children With FCCHEN Subsidies				
Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94112	Outer Mission / Excelsior / Ingleside	1	11	12
94116	Parkside / Forest Hill	0	2	2
94121	Outer Richmond / Sea Cliff	0	1	1
94122	Sunset	0	1	1
94124	Bayview / Hunters Point	3	9	12
94127	West Portal / St. Francis Wood	0	1	1
94132	Stonestown / Lake Merced	1	0	1
94133	North Beach / Telegraph Hill	1	1	2
94134	Visitacion Valley	1	5	6
	Out of County	1	3	4
	Total	8	34	42

Source: Children's Council of San Francisco, March 2022



ALTERNATIVE PAYMENT PROGRAMS

CDSS administers the [Alternative Payment Programs](#) (APP), a voucher-type program that reimburses licensed providers and license-exempt caregivers for care of a specific subsidized child based on the rate charged by the provider to non-subsidized families. Funding and enrollment is administered by one of two contracted APPs: Children's Council of San Francisco or the Department of Early Childhood, in partnership with the San Francisco Human Services Agency (HSA). These APPs distribute subsidy vouchers to eligible families for care in centers, FCC programs, or license-exempt care with family, friends, or neighbors. APP agencies make payment for ECE services directly to the provider selected by the family.

Number Of Children With California APP Subsidies

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	4	14	18
94103	South of Market	4	11	15
94104	Financial District	0	0	0
94105	Downtown	1	1	2
94107	Potrero Hill	1	11	12
94108	Chinatown	0	0	0
94109	Polk / Russian Hill / Nob Hill	5	6	11
94110	Inner Mission / Bernal Heights	10	39	49
94111	Embarcadero / Gateway	1	0	1
94112	Outer Mission / Excelsior / Ingleside	26	50	76
94114	Castro / Noe Valley	0	3	3
94115	Western Addition	0	7	7
94116	Parkside / Forest Hill	1	16	17
94117	Haight / Western Addition / Fillmore	2	4	6
94118	Inner Richmond / Presidio / Laurel H.	0	5	5
94121	Outer Richmond / Sea Cliff	4	11	15
94122	Sunset	6	11	17
94123	Marina / Cow Hollow	0	0	0
94124	Bayview / Hunters Point	22	44	66
94127	West Portal / St. Francis Wood	0	2	2
94129	Presidio	0	2	2
94130	Treasure Island	2	2	4
94131	Twin Peaks / Diamond Heights / Glen Park	1	9	10
94132	Stonestown / Lake Merced	8	17	25
94133	North Beach / Telegraph Hill	0	7	7
94134	Visitacion Valley	16	30	46
94158	Mission Bay	1	4	5
	Out of County	21	65	86
	Total	136	371	507



CalWORKs

[CalWORKs](#) is a state program that provides temporary cash aid to families with children under the age of 19, whose income and property holdings are below thresholds determined by the state. Subsidized ECE care is available for CalWORKs recipients who are participating in welfare-to-work activities that lead to employment and self-sufficiency and have children up to age 12 and/or children with special needs up to age 18. Families may choose to use their CalWORKs vouchers at licensed centers, licensed FCCs, or license-exempt providers such as family, friends, or neighbors.

The three stages of CalWORKs child care:

- **Stage 1** Child Care: Funded by CDSS and is locally administered by DEC, in partnership with HSA, through contracts with local Alternative Payment Program agencies (APPs). Stage 1 child care begins with a parent's entry into a County-approved welfare-to-work program or employment and continues for up to six months or until their work and child care are stable.
- **Stage 2** Child Care: CDSS contracts with the local Alternative Payment Program agencies (APPs) to administer Stage 2 Child Care. Families may receive Stage 2 Child Care for up to 24 months after they stop receiving cash aid.
- **Stage 3** Child Care: CDSS contracts with the local APPs to administer Stage 3 Child Care. Families can continue to receive Stage 3 Child Care until they no longer meet the income eligibility requirements or their children exceed the age limit.

Number Of Children With CalWORKs Stage 1, 2, 3 And CalLEARN Subsidies By Age

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	14	73	87
94103	South of Market	16	44	60
94104	Financial District	0	0	0
94105	Downtown	3	8	11
94107	Potrero Hill	9	21	30
94108	Chinatown	0	3	3
94109	Polk / Russian Hill / Nob Hill	5	27	32
94110	Inner Mission / Bernal Heights	15	57	72
94111	Embarcadero / Gateway	1	5	6
94112	Outer Mission / Excelsior / Ingleside	14	85	99
94114	Castro / Noe Valley	0	3	3
94115	Western Addition	10	43	53
94116	Parkside / Forest Hill	2	7	9
94117	Haight / Western Addition / Fillmore	1	7	8
94118	Inner Richmond / Presidio / Laurel H.	1	4	5
94121	Outer Richmond / Sea Cliff	2	10	12
94122	Sunset	2	6	8
94123	Marina / Cow Hollow	0	1	1
94124	Bayview / Hunters Point	40	171	211
94127	West Portal / St. Francis Wood	0	1	1
94129	Presidio	0	2	2
94130	Treasure Island	3	5	8
94131	Twin Peaks / Diamond Heights / Glen Park	2	14	16
94132	Stonestown / Lake Merced	4	34	38
94133	North Beach / Telegraph Hill	3	14	17
94134	Visitacion Valley	25	93	118
94158	Mission Bay	0	13	13
	Other/Out of County	23	70	93
	Total	195	821	1,016

Number Of Children With Each Stage Of CalWORKs Subsidies

	Ages 0-2	Ages 3-5	Ages 0-5
CalWORKs Stage 1	100	273	373
CalWORKs Stage 2	20	153	173
CalWORKs Stage 3	61	322	383

Source: Children's Council of San Francisco (March 2022)

See Appendices F, G and H for totals by zip code for each stage of CalWORKS.



HEAD START AND EARLY HEAD START

[Head Start](#) and [Early Head Start](#) are federally funded programs designed to provide ECE and comprehensive child development and family support services to low income infant and preschool age children. [Early Head Start](#) offers comprehensive services to families with infants and toddlers as well as pregnant women with the addition of a home visiting option.

Head Start and Early Head Start eligibility is based on Federal Poverty Guidelines; however, over income children can be served if there is space available. There are three designated Head Start/Early Head Start grantees in San Francisco - Kai Ming Inc., Mission Neighborhood Centers Inc., and Wu Yee Children's Services. The following chart illustrates the total number of children enrolled in Head Start and Early Head Start by age.

Although the total number of children enrolled in Head Start and Early Head Start has dropped in the past ten years, there has been great success in converting Head Start spaces to Early Head Start spaces. This conversion of spaces helps address the long-standing unmet need for infant/toddler care by targeting slots for younger children. See Appendix I for a historic comparison of the number of children with Head Start and Early Head Start subsidies.

Jefferson Sq.

Ellis St.

Eddy St.

Turk St.

Market St.
Powell Station

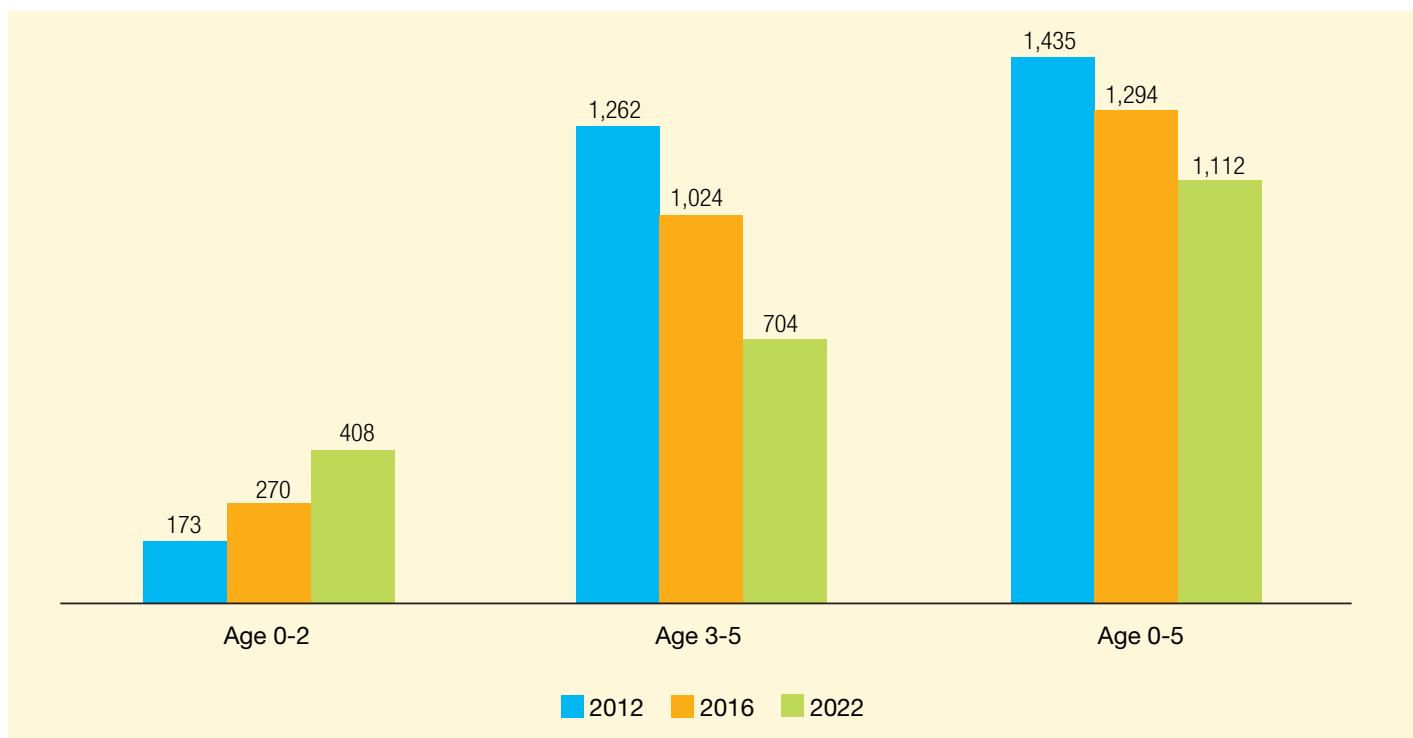
Number Of Children With Head Start And Early Head Start Subsidies By Age

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	28	29	57
94103	South of Market	23	37	60
94105	Downtown	3	2	5
94107	Potrero Hill	6	8	14
94108	Chinatown	17	30	47
94109	Polk / Russian Hill / Nob Hill	16	49	65
94110	Inner Mission / Bernal Heights	28	91	119
94111	Embarcadero / Gateway	28	22	50
94112	Outer Mission / Excelsior / Ingleside	69	82	151
94114	Castro / Noe Valley	0	1	1
94115	Western Addition	4	13	17
94116	Parkside / Forest Hill	5	45	50
94117	Haight / Western Addition / Fillmore	2	4	6
94118	Inner Richmond / Presidio / Laurel H.	2	6	8
94121	Outer Richmond / Sea Cliff	18	35	53
94122	Sunset	2	4	6
94124	Bayview / Hunters Point	60	82	142
94127	West Portal / St. Francis Wood	1	1	2
94130	Treasure Island	1	2	3
94131	Twin Peaks / Diamond Heights / Glen Park	2	2	4
94132	Stonestown / Lake Merced	8	12	20
94133	North Beach / Telegraph Hill	26	55	81
94134	Visitacion Valley	34	60	94
94158	Mission Bay	2	22	24
	Other/Out of County	23	10	33
	Total	408	704	1,112

Zip codes without associated data were removed for the table.

Source: Wu Yee Children's Services; Mission Neighborhood Centers; Kai Ming Head Start (April 2022)

Historic Comparison Of The Number Of Children With Head Start And Early Head Start Subsidies By Age (2012–2022)



Source: Source: Wu Yee Children's Services; Mission Neighborhood Centers; Kai Ming Head Start. Data from April 2012 to April 2016 to April 2022

It is common for Head Start/Early Head Start funding to be combined with other funding sources so that children are able to enroll in a full day of care. Early Head Start is often stacked with CCTR, and Head Start is often stacked with CSPP. All of the Early Head Start/Head Start agencies are also Title 5 contractors.

The total number of subsidies is higher than the number of children receiving subsidies due to stacked funding; therefore, the following chart depicts the stacked and unstacked number of children in Head Start and Early Head Start.



Number Of Children With Head Start / Early Head Start Subsidies –
With (Stacked) Or Without (Unstacked) Other Funding

Zip Code	Neighborhood	Early Head Start (Unstacked)	Early Head Start (Stacked)	Head Start (Unstacked)	Head Start (Stacked)	Total
94102	Hayes Valley / Tenderloin	6	22	1	28	57
94103	South of Market	5	18	0	37	60
94105	Downtown	0	3	0	2	5
94107	Potrero Hill	4	2	0	8	14
94108	Chinatown	9	8	1	29	47
94109	Polk / Russian Hill / Nob Hill	5	11	0	49	65
94110	Inner Mission / Bernal Heights	2	26	1	90	119
94111	Embarcadero / Gateway	0	28	0	22	50
94112	Outer Mission / Excelsior / Ingle-side	22	47	1	81	151
94114	Castro / Noe Valley	0	0	1	0	1
94115	Western Addition	0	4	1	12	17
94116	Parkside / Forest Hill	2	3	0	45	50
94117	Haight / Western Addition / Fillmore	1	1	0	4	6
94118	Inner Richmond / Presidio / Laurel H.	0	2	0	6	8
94121	Outer Richmond / Sea Cliff	1	17	0	35	53
94122	Sunset	0	2	0	4	6
94124	Bayview / Hunters Point	13	47	1	81	142
94127	West Portal / St. Francis Wood	0	1	0	1	2
94130	Treasure Island	0	1	0	2	3
94131	Twin Peaks / Diamond Heights / Glen Park	0	2	0	2	4
94132	Stonestown / Lake Merced	4	4	0	12	20
94133	North Beach / Telegraph Hill	13	13	0	55	81
94134	Visitacion Valley	9	25	2	58	94
94158	Mission Bay	0	2	2	20	24
	Missing / Other / Out of County	4	19	0	10	33
	Total	100	308	11	693	1,112

Zip codes without associated data were removed for the table.

Source: Wu Yee Children's Services; Mission Neighborhood Centers; Kai Ming Head Start (March 2022)



FAMILY AND CHILDREN'S SERVICES VOUCHERS FOR FOSTER/CHILD PROTECTIVE SERVICES CHILDREN

San Francisco Human Services Agency Family and Children's Services (HSA-FCS) is one of the very few county agencies in the state that subsidizes ECE for foster care cases, both in and out of county, and for families where the child is not removed but is case managed by Child Protective Services (CPS). HSA subsidizes ECE for working foster parents licensed by the county and for relatives who would otherwise be unable to have the child placed with them. Child care is treated as an entitlement for all eligible FCS children referred by their protective services.

Number Of Children With FCS Vouchers By Age

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	1	0	1
94103	South of Market	1	0	1
94110	Inner Mission / Bernal Heights	0	1	1
94112	Outer Mission / Excelsior / Ingleside	0	1	1
94115	Western Addition	0	1	1
94118	Inner Richmond / Presidio / Laurel H.	0	1	1
94122	Sunset	2	0	2
94102	Hayes Valley/Tenderloin	1	0	1
94103	South of Market	1	0	1
94110	Inner Mission/Bernal Heights	0	1	1
94124	Bayview / Hunters Point	1	5	6
94132	Stonestown / Lake Merced	1	2	3
	Missing/Other/Out of County	7	13	37
	Total	13	24	37

Zip codes without associated data were removed for the table.
Source: Children's Council of San Francisco (March 2022)

TRANSITIONAL KINDERGARTEN

The 2021–2022 California State Budget package established the Universal Prekindergarten (UPK) Planning and Implementation Grant Program as a state early learning initiative with the goal of expanding access to prekindergarten programs for all four year olds. The aim is to ensure that every 4-year-old child – regardless of language, race, zip code, immigration status, or income level– has access to a quality 9 hour a day learning experience by 2025-2026 school year. This process requires all partners—across early learning and care, early education, elementary education, and expanded learning and extended care communities—to work together to create a stronger system designed to meet the needs of the whole child in order to fulfill the state's mandate to offer Universal Pre-Kindergarten options to all eligible children. Transitional kindergarten (TK) is one component of the UPK system, which also includes FCC, SFUSD Preschool, non-profit community based programs, fee-based programs, and family, friends and neighbor care. For information see [California Department of Education's website](#).

The 2022-2023 school year is the first year of a multi-year process towards offering expanded universal pre-kindergarten access to eligible children. According to San Francisco Unified School District it is anticipated that approximately 1,400 children will have access to universal TK in 2025-2026. By the end of 2026 all elementary sites will have one or more TK classes and there will be a single enrollment process (1 application takes a child through TK-5th grade).

Prior to UPK, in 2021-2022 there was a drop in TK enrollment in San Francisco County as a result of the COVID-19 pandemic. In 2021-22 approximately 430 students were enrolled in TK compared with more than 500 students enrolled in TK pre-pandemic. However, in 2022-2023, there are 10 new TK sites and more than 700 placements offered in the first round of applications according to San Francisco Unified School District. This increase in capacity to offer more children TK is illustrated in the following chart.

TK Capacity Is Increasing		
	2021-2022	2022-2023
Number of Classes	24 classes	33 classes
Capacity	508 students	670 students

Source: SFUSD Early Education Department, June 2022

At the time of this report TK classrooms are part of the K-12 (now TK-12) public school system and represent the first year of a two-year kindergarten program, which uses a modified kindergarten curriculum. TK programs are intended to be aligned to the California Preschool Learning Foundations and the Kindergarten Common Core Standards developed by the CDE. Although TK is not compulsory, local education agencies (LEAs) are required to offer TK classes for all age-eligible children whose families apply to attend.

The ratio of teachers to children in TK is currently 1 teacher to 12 children (1:12 is the minimum state licensing requirement).

Even if a child is TK eligible, families have a choice of whether they want to enroll their child in TK or preschool. Eligibility for transitional kindergarten (TK) does not affect eligibility for other programs including the California State Preschool Program (CSPP), Head Start, as well as other subsidized programs administered by the CDSS.

PRESCHOOL FOR ALL (PFA)

[Preschool for All Tuition Credit Program \(PFA\)](#) is a San Francisco program that is open to all families regardless of income. PFA helps provide universal access to preschool to all 4-year-olds in the city. Families may receive a tuition credit of up to \$4,440 annually for:

- Reduced-cost or free half-day preschool (up to 3.5 hours a day)
- A tuition rebate to help reduce the cost of full-day preschool

Participating families must enroll their child in a participating program and pay the difference between the full cost of tuition and the tuition credit. PFA is offered at preschools that partner with the San Francisco Department of Early Childhood (DEC). San Francisco Unified School District (SFUSD) offers PFA at many of their preschool sites.

Number Of Enrolled Children In PFA

Zip Code	Neighborhood	Ages 0-2
94102	Hayes Valley / Tenderloin	10
94103	South of Market	9
94104	Financial District	0
94105	Downtown	10
94107	Potrero Hill	33
94108	Chinatown	2
94109	Polk / Russian Hill / Nob Hill	20
94110	Inner Mission / Bernal Heights	35
94111	Embarcadero / Gateway	1
94112	Outer Mission / Excelsior / Ingleside	41
94114	Castro / Noe Valley	36
94115	Western Addition	40
94116	Parkside / Forest Hill	32
94117	Haight / Western Addition / Fillmore	55
94118	Inner Richmond / Presidio / Laurel H.	37
94121	Outer Richmond / Sea Cliff	17
94122	Sunset	48
94123	Marina / Cow Hollow	13
94124	Bayview / Hunters Point	10
94127	West Portal / St. Francis Wood	12
94129	Presidio	3
94130	Treasure Island	1
94131	Twin Peaks / Diamond Heights / Glen Park	27
94132	Stonestown / Lake Merced	20
94133	North Beach / Telegraph Hill	7
94134	Visitacion Valley	14
94158	Mission Bay	16
	Missing/Other/Out of County	267
	Total	816

Source: San Francisco Department of Early Childhood (March 2022 and March 2023)

EARLY CARE AND EDUCATION FOR CHILDREN EXPERIENCING HOMELESSNESS

ECE for children experiencing homelessness is provided through a network of licensed centers and FCC engaged in the city's quality assessment process and participating in mental health and health consultation. There were 109 total children who were experiencing homelessness ages 0-5 who received subsidies as of March 2022, 28 0-2 year olds and 81 3-5 year olds.

The total number of children experiencing homelessness who received ECE subsidies increased by 35 children since 2016. These numbers do not reflect the number of children who experience homelessness served through the general subsidy system or Head Start.

EARLY LEARNING SF

Early Learning SF (ELSF) is an online tool that helps families find out if they qualify for financial assistance to cover the cost of early care and education. Using this tool is the first step for families to apply for subsidized ECE. After answering a few questions about their family, income, and the kind of program preferred, the family will find out if they qualify and, as funding becomes available, can be matched with quality ECE programs in their area.



EARLY LEARNING SAN FRANCISCO (ELS)

In July 2017, the Office of Early Care and Education (OECE), part of the Department of Early Childhood with First 5 SF, launched San Francisco's Early Learning Scholarship, now called [Early Learning San Francisco \(ELS\)](#). ELS provides financial assistance to increase access to quality ECE for income-eligible San Francisco families with children under five years old. More than 450 ECE programs, both center-based and FCC, participate in ELS.

ELS pays programs enhanced rates and provides additional funding or resources to cover the cost of operating a quality program, defined as meeting or exceeding the established Quality Standards. ELS participating programs receive professional development, coaching, technical assistance and resources to enhance the quality of their programs.

ELS vouchers provide a portable parent/guardian-based San Francisco voucher to eligible/income-based families who are ineligible for other state or federal subsidies. An eligible family's gross income must be at/or below 110% of the Area Median Income (AMI) as of the time this report was written. Programs with an ELS voucher enrollment receive full tuition reimbursement at the ELS rates, and enrollment for the child continues until they reach kindergarten-age.

Centers may also enroll eligible children through Center - Maximum Reimbursable Amount funding, which is a contract-based system. These are fully funded enrollments at the current ELS rates for children 0-5. The Maximum Reimbursable Amount (MRA) calculates the total funding the program can earn by enrolling ELS subsidized children.

Number Of Enrolled Children In ELS

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 0-5
94102	Hayes Valley / Tenderloin	48	89	137
94103	South of Market	49	99	148
94104	Financial District	0	1	1
94105	Downtown	2	19	21
94107	Potrero Hill	9	35	44
94108	Chinatown	11	23	34
94109	Polk / Russian Hill / Nob Hill	16	51	67
94110	Inner Mission / Bernal Heights	71	134	205
94111	Embarcadero / Gateway	5	5	10
94112	Outer Mission / Excelsior / Ingleside	114	206	320
94114	Castro / Noe Valley	1	10	11
94115	Western Addition	15	63	78
94116	Parkside / Forest Hill	14	62	76
94117	Haight / Western Addition / Fillmore	5	34	39
94118	Inner Richmond / Presidio / Laurel H.	21	19	40
94121	Outer Richmond / Sea Cliff	18	28	46
94122	Sunset	26	34	60
94123	Marina / Cow Hollow	0	2	2
94124	Bayview / Hunters Point	83	145	228
94127	West Portal / St. Francis Wood	5	12	17
94129	Presidio	0	2	2
94130	Treasure Island	2	7	9
94131	Twin Peaks / Diamond Heights / Glen Park	2	8	10
94132	Stonestown / Lake Merced	35	41	76
94133	North Beach / Telegraph Hill	22	17	39
94134	Visitacion Valley	87	159	246
94158	Mission Bay	15	26	41
	Missing/Other/Out of County	25	106	131
	Total	701	1,437	2,138



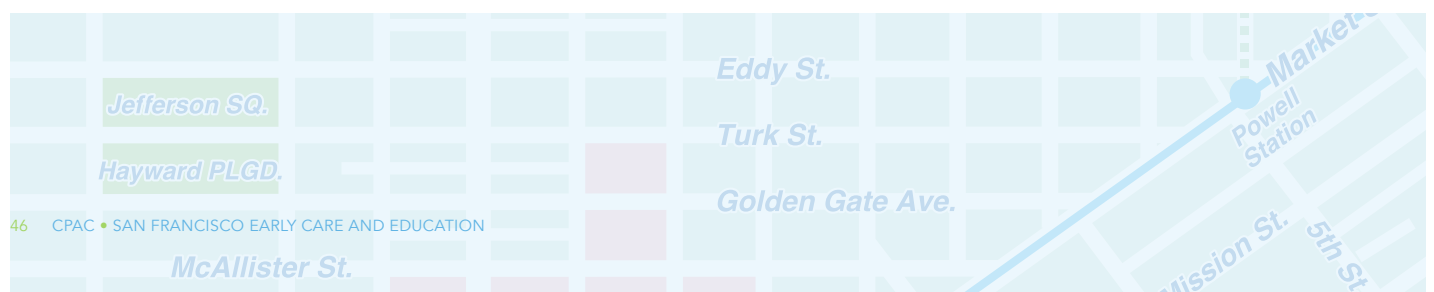
CHAPTER 6: UNMET NEED VERSUS SUPPLY OF SUBSIDIZED SPACES

Through federal, state, and local funding, subsidy-eligible children have access to a wide range of ECE options, including Head Start / Early Head Start, Title 5, CalWORKs vouchers, APPs, local vouchers, and more.

TOTAL SUBSIDIZED SPACES

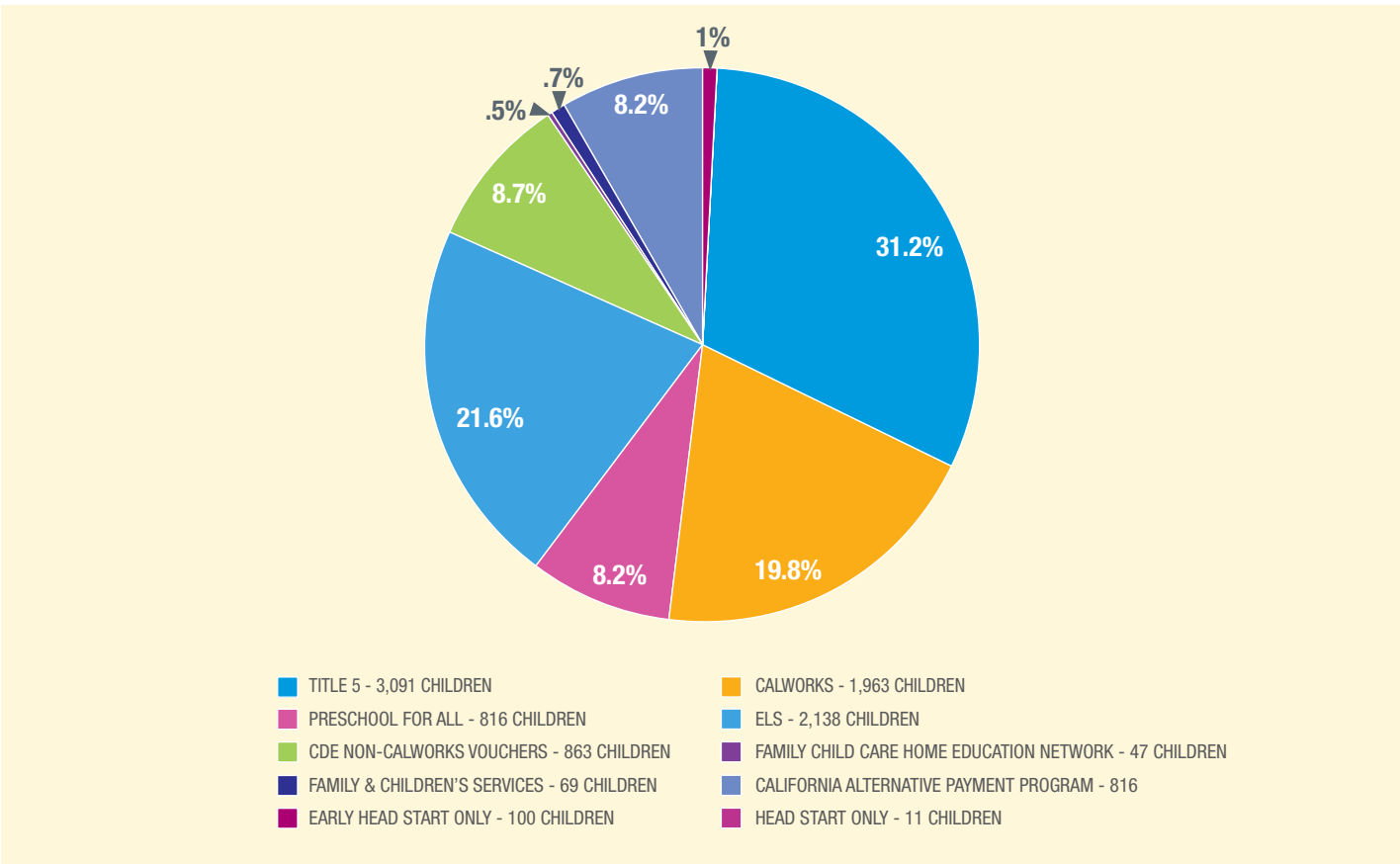
In San Francisco, there were **9,914 subsidized ECE spaces** through licensed and vouchered options in the spring of 2022 compared to 9,510 in the spring of 2016.

Since some children receive multiple types of subsidies (“stacked funding”) to cover the cost of their ECE space, the numbers presented are an estimate of the total unduplicated count of children who receive subsidies in San Francisco. The total number of subsidies is higher than the total number of children receiving subsidies.





The Percent Of Children Who Receive Each Type Of Subsidy

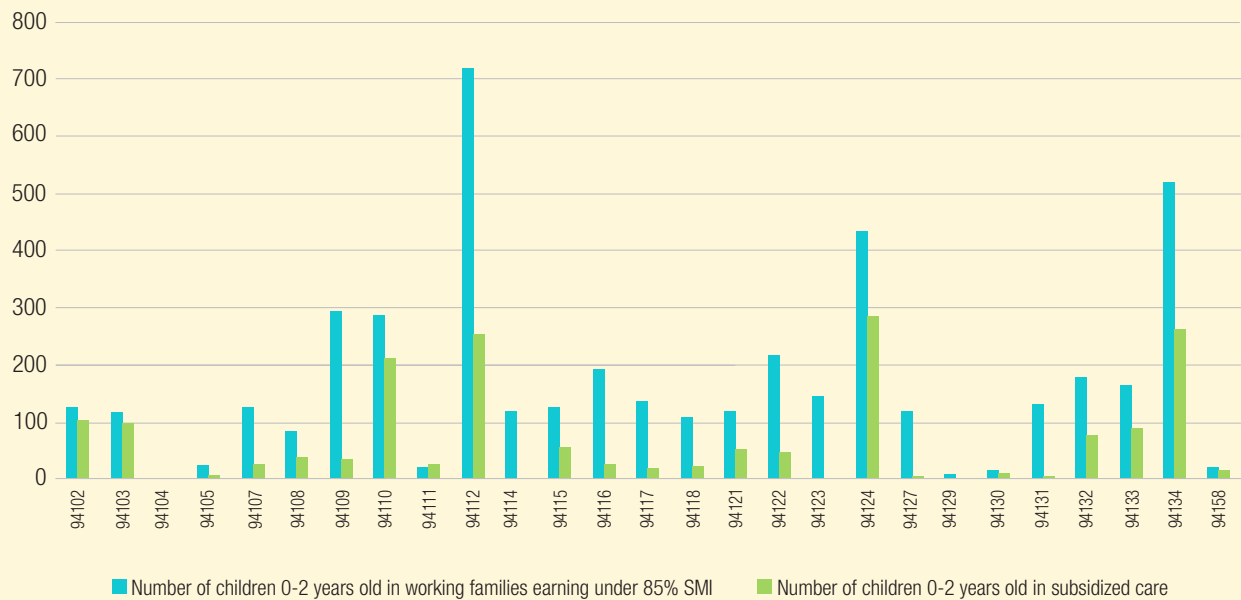


Note: Data are from March or April 2022. See source information within each subsidy section.

UNMET NEED FOR SUBSIDIZED CARE BY ZIP CODE

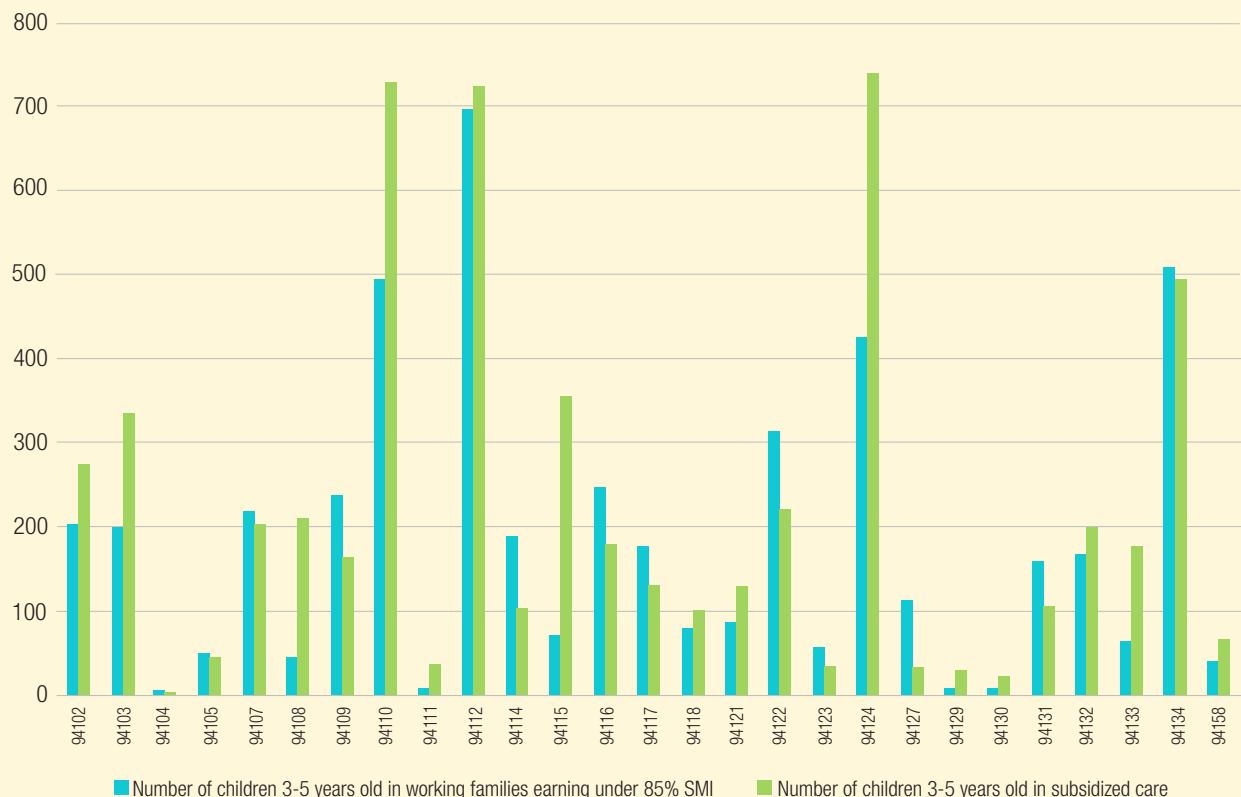
Each subsidized program uses slightly different eligibility criteria. For this reason an estimation regarding the total number of children eligible for subsidized care is based on those who live with families that earn less than 85% SMI. The unmet need for subsidized care is most critical among children 0-2 years old whereas the overall need is currently met for those who are 3-5 years old. The following charts illustrate the estimated need for subsidized care compared to the number of children enrolled in subsidized care by zip code. This does not imply that families will not travel outside of their zip code to access care.

59% Of Income Eligible 0-2 Year Olds Face An Unmet Need For Subsidized Child Care While The Unmet Need Is Even Higher In Specific Zip Codes



Source: 85% SMI data: Five-year estimates from American Community Survey (2020), AIR analysis of American Community Survey; Subsidized data: March or April 2022. See source information within each subsidy section.

There Is No Unmet Need For Subsidized Care For Children 3-5 Years Old In San Francisco As A Whole Despite There Being Specific Zip Codes Where There Is Not Enough Subsidized Care For The Number Of Eligible Children Living In That Zip Code



Source: 85% SMI data: Five-year estimates from American Community Survey (2020), AIR analysis of American Community Survey; Subsidized data: March or April 2022. See source information within each subsidy section.



NUMBER OF CHILDREN WAITING FOR SUBSIDIZED CARE

There are 1,368 children ages 0-5 years old (559 infants, 298 toddlers, and 511 preschoolers) who are waiting to obtain subsidized child care according to Children’s Council of San Francisco (December, 2022).

CHAPTER 6 CRITICAL FINDINGS

- There were 9,914 subsidized ECE spaces in 2022 compared to 9,510 in 2016.
- There are 1,368 children ages 0-5 years old (559 infants, 298 toddlers, and 511 preschoolers) who are waiting to obtain subsidized care.
- 59% of income eligible children ages 0-2 years old are not accessing subsidized child care in San Francisco; the need is higher in specific zip codes, including 94109, 94112, and 94134.
- There is no unmet need for subsidized care for children 3-5 years old as a whole in San Francisco despite there being a need within specific zip codes, including 94114, 94122, and 94127.



CHAPTER 7: PARENT CHOICE

Parent choice is a term used to characterize when families select an ECE setting that best fits their needs and the needs of their child(ren). Choices may be constrained for a number of factors including availability of viable options.

PARENT CHOICE WITH VOUCHERS

State vouchers can be used at licensed centers, at licensed FCC programs, or with license-exempt caregivers, commonly known as family, friends, and neighbors (FFN). This data provides one way to look at broad patterns of choice in ECE.

There were 3,008 children ages 0-12 years old who received state-funded vouchers according to Children’s Council of San Francisco (March 2022). Of these 21% (n=643) selected care in licensed centers, 33% (n=1,001) in FCCs, and 45% (n=1,364) in license-exempt programs. The following chart reports the breakdown of voucher use by type of care within each zip code for children ages 0-12 years old.



Summary Of Number Of Children Receiving Voucher Care By Kind Of Care

Zip Code	Neighborhood	Children Receiving Care in Licensed Centers	Children Receiving Care in Licensed FCCs	Children Receiving Care in License-Exempt Care	Total Children with Vouchers
94102	Hayes Valley / Tenderloin	13	14	50	77
94103	South of Market	44	34	43	121
94105	Downtown	2	3	3	8
94107	Potrero Hill	7	16	26	49
94108	Chinatown	19	10	9	38
94109	Polk / Russian Hill / Nob Hill	12	3	19	34
94110	Inner Mission / Bernal Heights	75	76	130	281
94111	Embarcadero / Gateway	0	1	0	1
94112	Outer Mission / Excelsior / Ingleside	47	239	117	403
94114	Castro/ Noe Valley	9	10	3	22
94115	Western Addition	53	43	64	160
94116	Parkside / Forest Hill	25	27	9	61
94117	Haight / Western Addition / Fillmore	3	3	14	20
94118	Inner Richmond / Presidio / Laurel H.	32	13	12	57
94121	Outer Richmond / Sea Cliff	44	43	4	91
94122	Sunset	37	8	21	66
94124	Bayview / Hunters Point	29	175	297	501
94127	West Portal / St. Francis Wood	2	3	4	9
94129	Presidio	2	0	2	4
94130	Treasure Island	2	4	10	16
94131	Twin Peaks / Diamond Heights / Glen Park	15	1	14	30
94132	Stonestown / Lake Merced	23	25	38	86
94133	North Beach / Telegraph Hill	7	4	11	22
94134	Visitacion Valley	29	112	133	274
94158	Mission Bay	3	3	4	10
	Out of County	109	131	327	567
	Total	643	1,001	1,364	3,008

Source: Children's Council of San Francisco (March 2022)

Children receive care close to home and outside of their neighborhood. Many families use care near their workplace or on their route between home and work. Others select a particular location because they know and prefer a provider. Some families may assess the quality of a program as being worth the travel outside their neighborhood, especially in cases where there are limited options close to home.

The portability and affordability of the vouchers, along with data from a large group of families, gives insight into care choices. Given the density and proximity of zip codes in San Francisco, families frequently leave their home zip code in order to obtain care near work, with a preferred care provider or because of lack of care in their home zip code. Seventy four percent of families who use vouchers for center-based care travel outside of their home zip code compared to 63% of families who use FCCs, thus suggesting that FCCs may offer more convenient options closer to home compared to center-based care. Overall 69% of families with vouchers receive care outside of their home zip code, an increase from 60% in 2016.

Families Who Use Vouchers For FCC Care Are Most Likely To Stay In Their Home Zip Code

	Vouchers in home zip code	Vouchers outside home zip code
Licensed Centers	26%	74%
FCCs	37%	63%
Licensed Exempt Providers	29%	71%
All Types of Care	31%	29%

Source: Children’s Council of San Francisco (March 2022)

The following chart illustrates how vouchered care is used by different races/ethnicities, followed by a breakdown of race/ethnicity by type of vouchered care used.

Child Race/Ethnicity By Vouchered Care

Race/Ethnicity	Vouchers in home zip code	Vouchers outside home zip code
American Indian or Alaskan Native	28	1%
Asian	408	14%
Black or African American	1,214	40%
Caucasian	307	10%
Hispanic or Latino	1,004	33%
Native Hawaiian or Other Pacific Islander	47	2%
Total	3,008	100%

Note: The sample size may not be large enough to support generalizations to the larger population.
 Source: Children’s Council of San Francisco (March 2022)

Child Race/Ethnicity By Type Of Vouchered Care Used

	Licensed Centers	% Centers	FCC	% FCC	Licensed Exempt	% Licensed Exempt	Total Children with Vouchers
American Indian or Alaskan Native	12	43%	5	18%	11	39%	28
Asian	119	29%	130	32%	159	39%	408
Black or African American	203	17%	336	28%	675	56%	1214
Caucasian	97	32%	111	36%	99	32%	307
Hispanic or Latino	207	21%	412	41%	385	38%	1004
Native Hawaiian or Other Pacific Islander	5	11%	7	15%	35	74%	47
Total	643	21%	1,001	33%	1,364	45%	3,008

Source: Children's Council of San Francisco (March 2022)



CHAPTER 7 CRITICAL FINDINGS

- Seventy-four percent of families who use vouchers for center-based care travel outside of their home zip code compared to 63% of families who use FCCs.
- Overall 69% of families with vouchers are enrolled in care outside of their home zip code.
- Black and Pacific Islander families choose license exempt care at higher rates than other races/ethnicities and Latino families choose FCCs at higher rates.



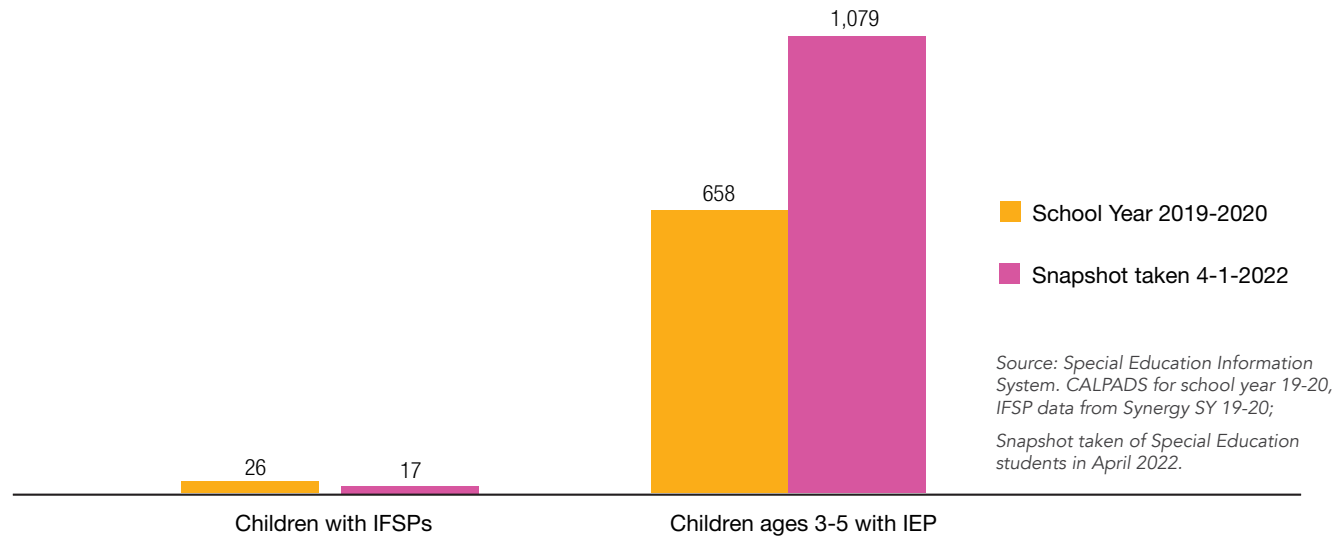
CHAPTER 8: SPECIAL POPULATIONS

CHILDREN WITH IFSPs AND IEPs

An IFSP is used in early intervention for children ages birth through age two and their families. An IEP is used for children ages three to 21. It focuses on special education and related services in schools. The following table illustrates the number of children with IFSPs and IEPs per zip code followed by a chart that depicts the increase in IFSPs and IEPs since the onset of the pandemic.

Due to the pandemic and remote care/learning, many young children were not seen or screened for developmental concerns. This could contribute to the reason the number of children with IFSPs decreased and increased for those with IEPs compared to pre-pandemic numbers.

Since the Onset Of the Pandemic The Number Of Children With IFSPs Has Decreased And The Number Of Children With IEPs (ages 3-5) Has Increased



CHAPTER 8 CRITICAL FINDINGS

- According to a snapshot in April 2022, there were 17 children with IFSPs, 1,079 children ages 3-5 years old with IEPs, and 3,919 school age children with IEPs (ages 6-12 years old).

The Number Of Children Who Have An IFSP Or IEP By Age

Zip Code	Neighborhood	Ages 0-2 with IFSP	Ages 3-5 with IEP	Ages 6-12 with IEP
94102	Hayes Valley / Tenderloin	0	9	49
94103	South of Market	12	24	108
94105	Downtown	0	0	2
94107	Potrero Hill	0	9	79
94108	Chinatown	0	17	59
94109	Polk / Russian Hill / Nob Hill	0	3	46
94110	Inner Mission / Bernal Heights	1	112	360
94111	Embarcadero / Gateway	0	0	2
94112	Outer Mission / Excelsior / Ingelside	0	63	351
94114	Castro/ Noe Valley	0	30	329
94115	Western Addition	0	65	134
94116	Parkside / Forest Hill	0	187	353
94117	Haight / Western Addition / Fillmore	0	38	153
94118	Inner Richmond / Presidio / Laurel H.	0	22	133
94121	Outer Richmond / Sea Cliff	0	224	275
94122	Sunset	0	37	318
94123	Marina / Cow Hollow	0	37	161
94124	Bayview / Hunters Point	0	54	79
94127	West Portal / St. Francis Wood	0	14	200
94129	Presidio	4	13	0
94130	Treasure Island	0	0	0
94131	Twin Peaks / Diamond Heights / Glen Park	0	30	176
94132	Stonestown / Lake Merced	0	28	109
94133	North Beach / Telegraph Hill	0	10	157
94134	Visitacion Valley	0	53	285
94143	UCSF	0	0	1
	Total	17	1,079	3,919

Zip codes without associated data were removed for the table.

Data represents a snapshot of current Special Education students on April 25, 2022. Source: Special Education Information System.

CALPADS for school year 19-20, IFSP data from Synergy SY 19-20



CHAPTER 9: ECE WORKFORCE

CALIFORNIA ECE WORKFORCE REGISTRY

The California ECE Workforce Registry is a state, regional, and local collaboration designed to track and promote the education, training, and experience of the ECE workforce for the purpose of improving professionalism and workforce quality to positively impact children. The Registry provides access to meaningful data about trends in the workforce. In San Francisco, all programs/workforce who participate in city and state quality improvement initiatives are required to have a Registry profile.

THE COMPENSATION AND RETENTION EARLY EDUCATOR STIPEND (CARES) 2.0

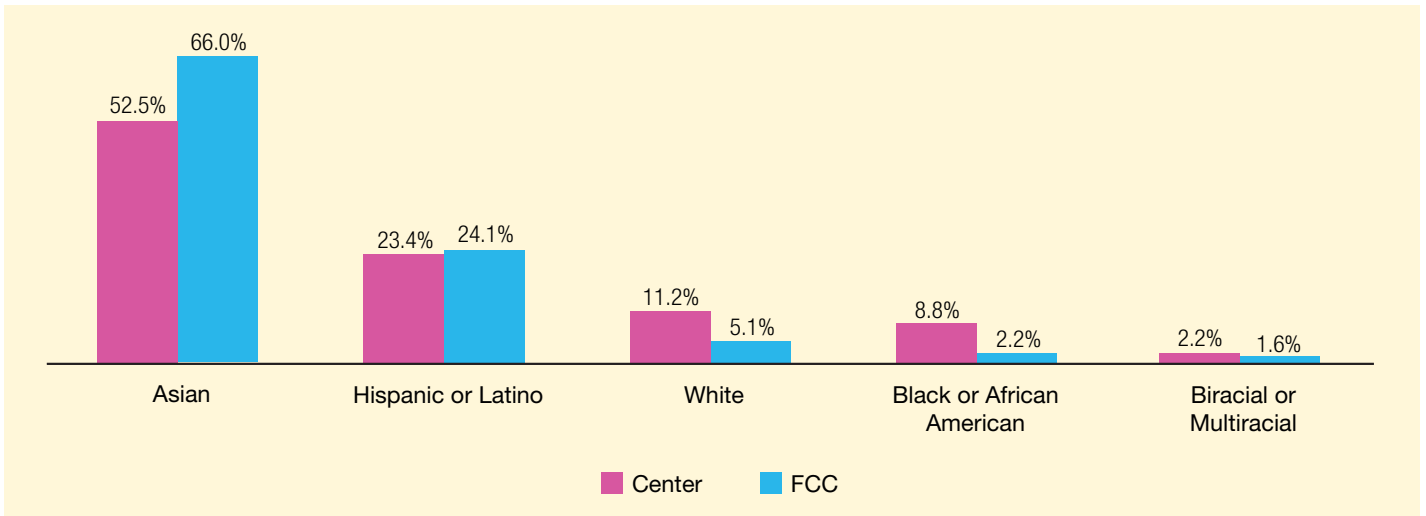
CARES 2.0 was developed by the San Francisco OECE in partnership with First 5 San Francisco to support ECE educators from the Fall of 2019 until Spring 2022. Stipends are distributed twice a year. There were 2,293 CARES 2.0 applicants in the Spring of 2022 who had complete demographic data sets. **The information collected from these applicants provides the following snapshot insight into the ELS participating workforce in San Francisco County.**

WORKFORCE RACE/ETHNICITY

Slightly more than half (56%) of the 2,293 CARES 2.0 stipend recipients self-reported as being of Asian descent. The data sets for Pacific Islands, Native Americans, Alaskan Natives, and Others are not included due to the low number of reports in those categories.



The Majority Of ECE ELS Workforce Identify As Being Of Asian Descent



Source: Cares 2.0 Databook, San Francisco Department of Education, 2022

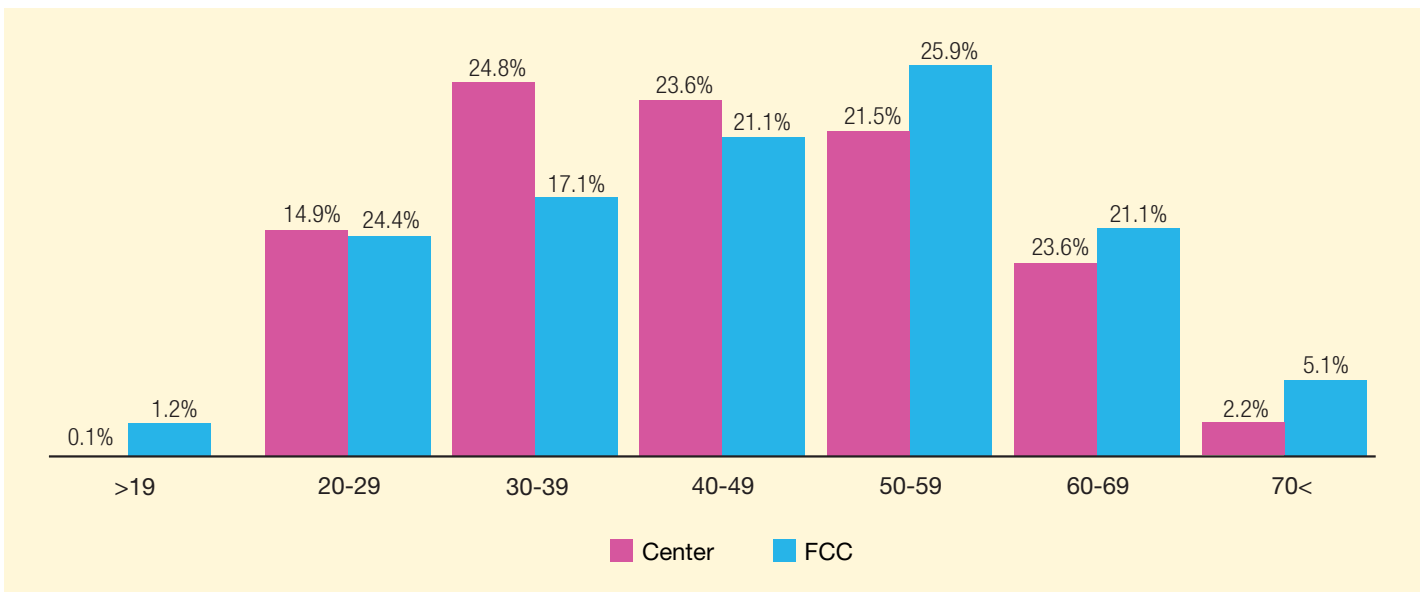
WORKFORCE LANGUAGE SPOKEN AT HOME

Fewer than half (41%) indicated that English is their primary language spoken at home. The second most common spoken language was Cantonese (31%), then Spanish (16%) and Mandarin (6%). Other languages spoken at home included Russian, Tagalog, Vietnamese, and Japanese.

WORKFORCE AGE

The ages of the workforce ranged between 18-88 years old. The average age was 45. Those working in center-based programs tended to be younger than those in FCC programs: 63.4% of center-based workforce were under 50 years old and 36.6% were over 50 years old compared to 53.9% of FCC workforce were under 50 years old and 46.1% were over 50 years old as illustrated by the following chart.

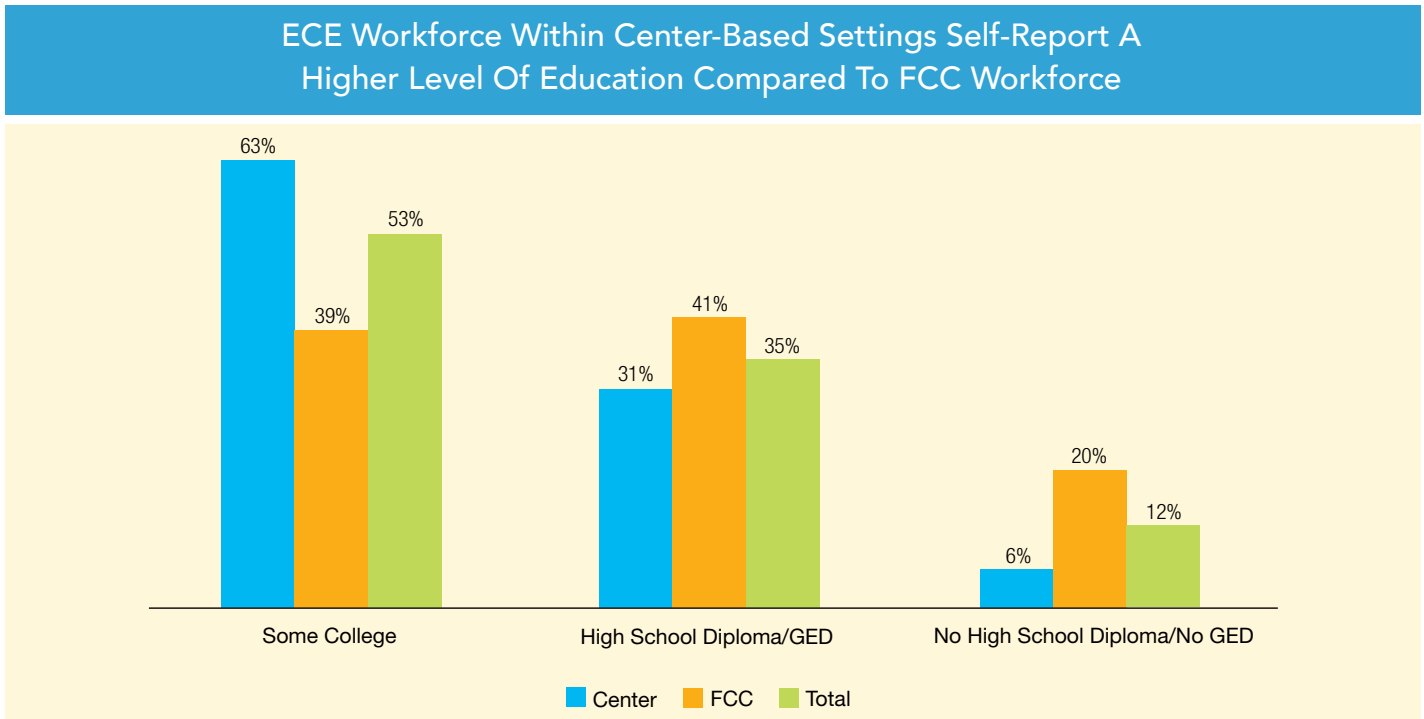
Center-Based Workforce Tends To Be Younger Than FCC Workforce



Source: Cares 2.0 Databook, San Francisco Department of Education, 2022

WORKFORCE HIGHEST EDUCATION LEVEL

More than half (53%) self-reported some college level of education. This rate was higher among those who work in a center-based program (63%) compared to those who work in a FCC program (39%).

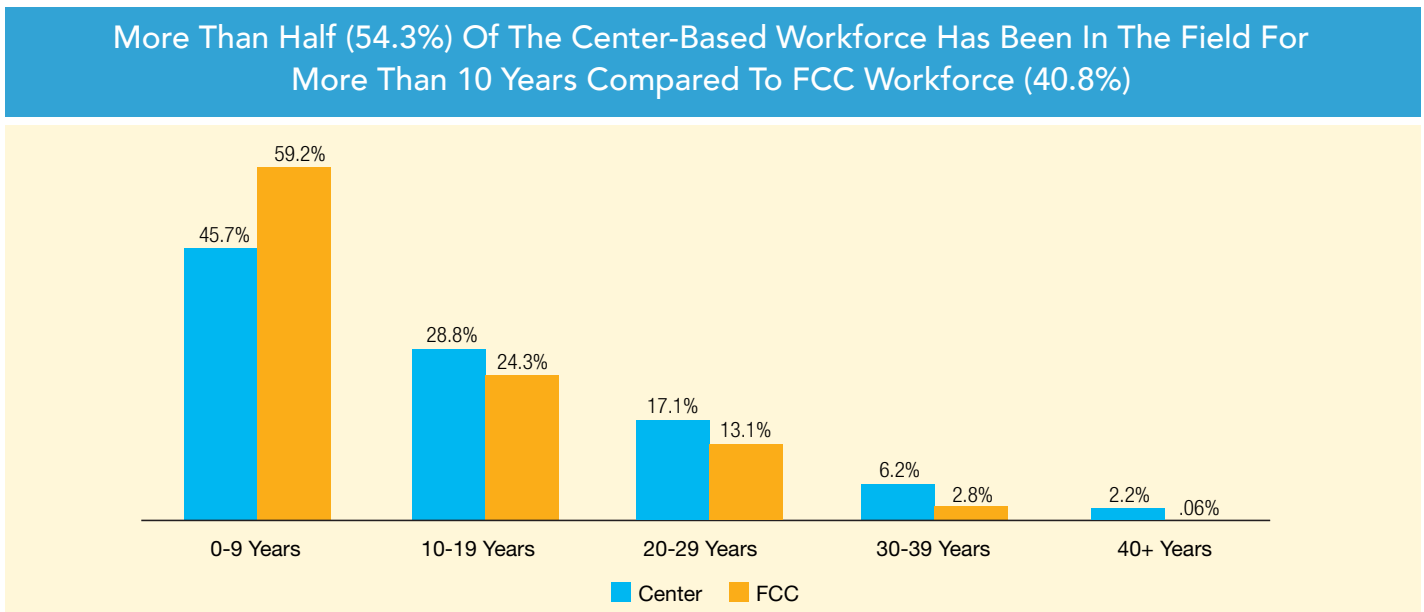


Source: Cares 2.0 Databook, San Francisco Department of Education, 2022

EMPLOYMENT INFORMATION

Program Setting: More than half (58%) were employed in a center-based setting, while 29% of applicants worked in family child care settings, and 13% worked at SFUSD. Those who work at SFUSD are grouped into “center-based” data for the rest of the highlights.

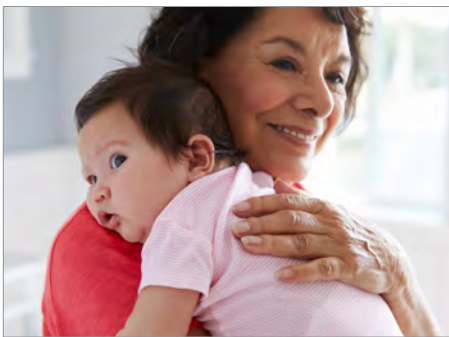
Years in the Field: The majority (49.5%) of CARES 2.0 recipients have been in the ECE field for less than ten years, (45.7% for center-based workforce and 59.2% for FCCs). Those who work in centers have been in the field for a longer period of time compared to FCCs

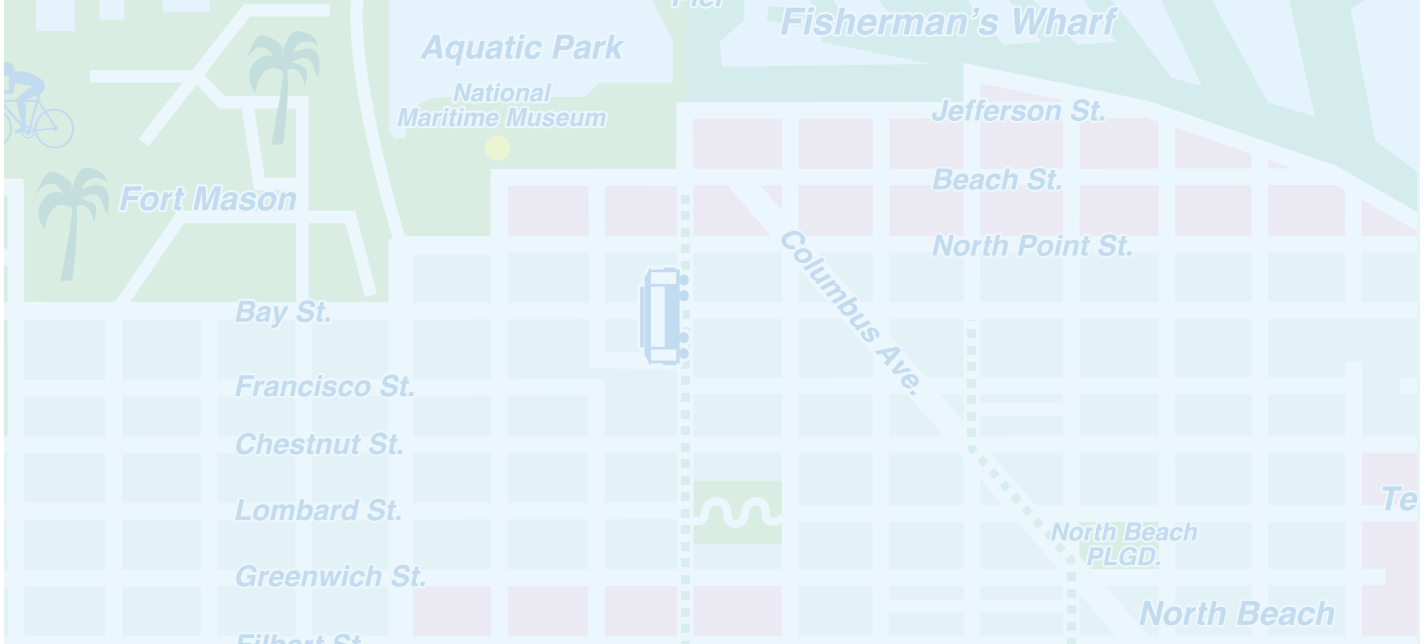


Source: Cares 2.0 Databook, San Francisco Department of Education, 2022

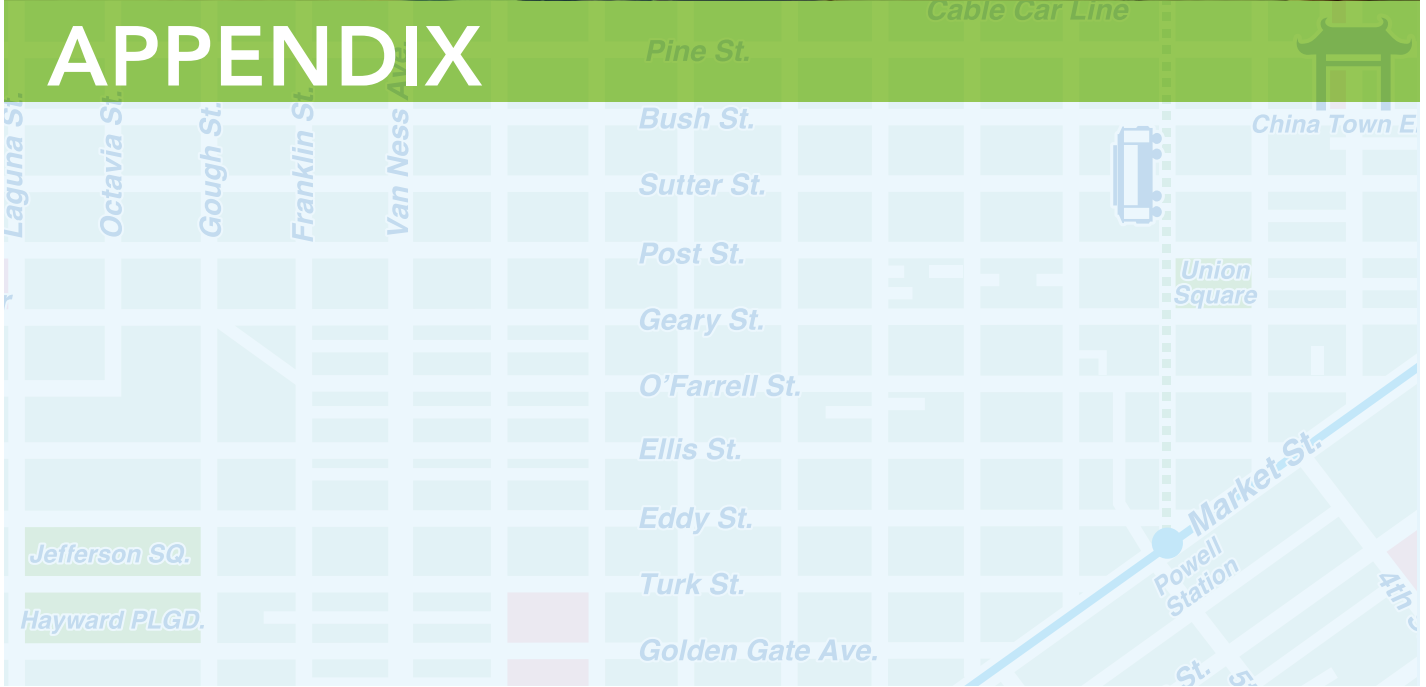
CHAPTER 9 CRITICAL FINDINGS

- CARES 2.0 stipends are distributed twice a year. There were 2,293 applicants in the Spring of 2022. Slightly more than half (56%) self-reported as being of Asian descent.
- Fewer than half (41%) indicated that English is their primary language spoken at home. The second most spoken language was Cantonese (31%), then Spanish (16%) and Mandarin (6%).
- The median and the average age of the ECE educators were 45 years old.
- More than half (53%) self report some college level of education. This rate was higher among those who work in a center-based program (63%) compared to those who work in a FCC program (39%).





APPENDIX



The Number And Percent Of Children Living In Households Earning Under 100% Of The Federal Poverty Level By Zip Code And Age

Zip Code	0-2 YEARS			3-5 YEARS			6-12 YEARS			0-12 YEARS		
	Total Population	Number of children in working families earning under 100% FPL	Percent of children in working families earning under 100% FPL	Total Population	Number of children in working families earning under 100% FPL	Percent of children in working families earning under 100% FPL	Total Population	Number of children in working families earning under 100% FPL	Percent of children in working families earning under 100% FPL	Total Population	Number of children in working families earning under 100% FPL	Percent of children in working families earning under 100% FPL
San Francisco	25,076	1602	6.4%	21675	2183	10.1%	42,105	4,366	10.4%	88,856	8,151	9.2%
94102	1015	55	5.4%	898	107	11.9%	1,214	177	14.6%	1,391	339	24.4%
94103	876	38	4.3%	815	93	11.4%	1,054	141	13.4%	1,195	272	22.8%
94104	11	0	0.0%	12	2	16.7%	13	3	23.1%	16	5	30.8%
94105	177	12	6.8%	183	29	15.8%	196	42	21.4%	238	83	34.8%
94107	812	54	6.7%	843	133	15.8%	911	197	21.6%	1,108	384	34.7%
94108	374	22	5.9%	228	26	11.4%	459	54	11.8%	513	102	19.9%
94109	1630	95	5.8%	1154	137	11.9%	1,981	256	12.9%	2,237	488	21.8%
94110	2297	79	3.4%	2042	193	9.5%	2,846	299	10.5%	3,145	571	18.2%
94111	96	5	5.2%	50	5	10.0%	120	12	10.0%	132	22	16.7%
94112	2219	266	12.0%	2535	358	14.1%	5,683	692	12.2%	6,375	1,316	20.6%
94114	1093	15	1.4%	864	27	3.1%	1,546	54	3.5%	1,600	96	6.0%
94115	1116	55	4.9%	635	25	3.9%	1,460	105	7.2%	1,565	185	11.8%
94116	1324	71	5.4%	1293	91	7.0%	2,685	122	4.5%	2,807	284	10.1%
94117	1400	38	2.7%	986	27	2.7%	1,921	89	4.6%	2,010	154	7.7%
94118	1404	68	4.8%	816	18	2.2%	1,859	119	6.4%	1,978	205	10.4%
94121	1509	72	4.8%	878	19	2.2%	1,998	128	6.4%	2,126	219	10.3%
94122	1771	73	4.1%	1670	101	6.0%	3,393	178	5.2%	3,571	352	9.9%
94123	608	35	5.8%	319	33	10.3%	761	76	10.0%	837	144	17.2%
94124	1042	145	13.9%	1228	227	18.5%	2,782	620	22.3%	3,402	992	29.2%
94127	492	52	10.6%	553	56	10.1%	1,236	28	2.3%	1,264	136	10.8%
94129	116	6	5.2%	67	1	1.5%	153	10	6.5%	163	17	10.4%
94130	77	4	5.2%	39	4	10.3%	96	10	10.4%	106	18	17.0%
94131	815	43	5.3%	769	52	6.8%	1,564	52	3.3%	1,616	147	9.1%
94132	715	78	10.9%	809	84	10.4%	1,809	40	2.2%	1,849	202	10.9%
94133	693	39	5.6%	364	36	9.9%	867	87	10.0%	954	162	17.0%
94134	1249	173	13.9%	1474	273	18.5%	3,337	744	22.3%	4,081	1,190	29.2%
94158	145	10	6.9%	151	24	15.9%	161	35	21.7%	196	69	35.2%

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds and 2018 for school age children)

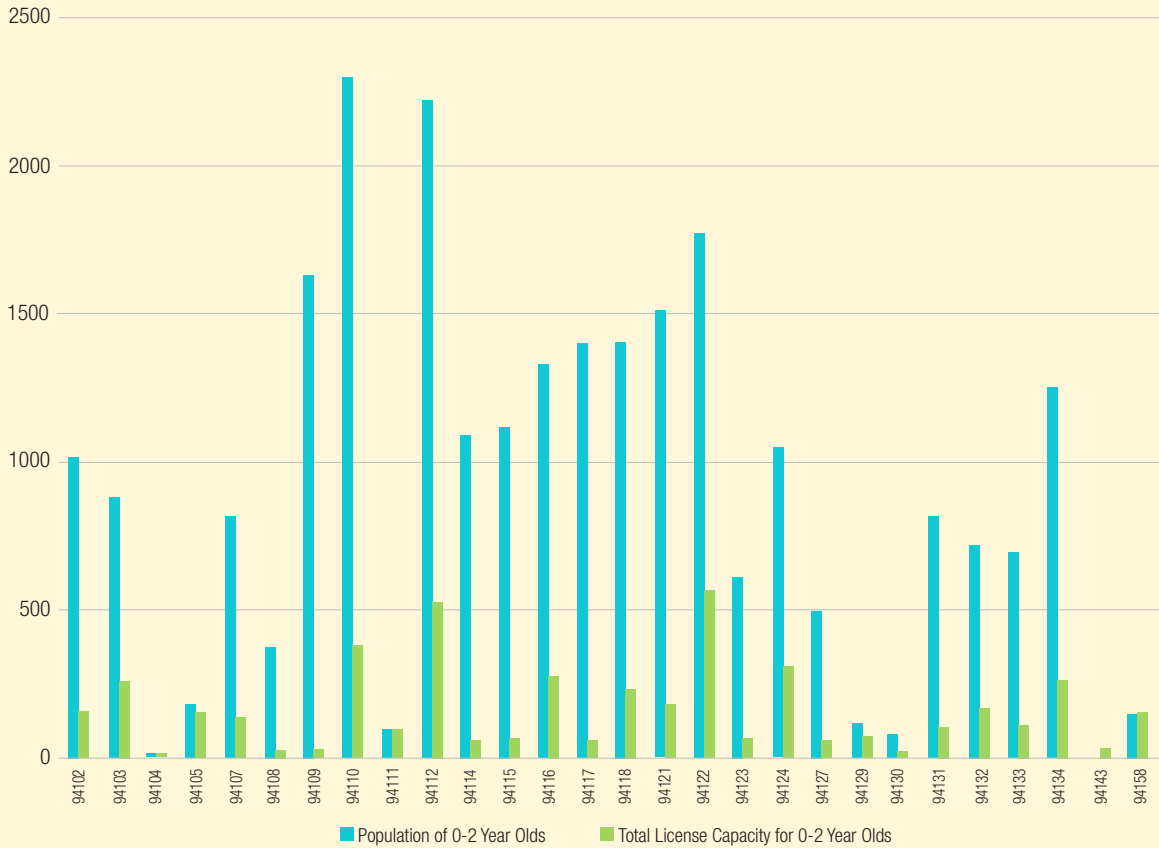
The Number And Percent Of Children In Working Families Earning Under 85% State Median Income (SMI) By Zip Code

Zip Code	0-2 YEARS			3-5 YEARS			6-12 YEARS			0-12 YEARS		
	Total Population	Number of children in working families earning under 85% SMI	Percent of children in working families earning under 85% SMI	Total Population	Number of children in working families earning under 85% SMI	Percent of children in working families earning under 85% SMI	Total Population	Number of children in working families earning under 85% SMI	Percent of children in working families earning under 85% SMI	Total Population	Number of children in working families earning under 85% SMI	Percent of children in working families earning under 85% SMI
San Francisco	25,076	1602	6.4%	21675	2183	10.1%	42,105	4,366	10.4%	88,856	8,151	9.2%
94102	1015	126	12.4%	898	203	22.6%	1,214	427	35.2%	1,641	756	46.1%
94103	876	116	13.2%	815	201	24.7%	1,054	338	32.1%	1,392	655	47.0%
94104	11	2	18.2%	12	4	33.3%	13	6	46.2%	19	12	61.7%
94105	177	26	14.7%	183	48	26.2%	196	92	46.9%	288	166	57.5%
94107	812	121	14.9%	843	218	25.9%	911	427	46.9%	1,338	766	57.2%
94108	374	84	22.5%	228	45	19.7%	459	160	34.9%	619	289	46.7%
94109	1630	293	18.0%	1154	238	20.6%	1,981	698	35.2%	2,679	1,229	45.9%
94110	2297	288	12.5%	2042	493	24.1%	2,846	765	26.9%	3,611	1,546	42.8%
94111	96	23	24.0%	50	8	16.0%	120	39	32.5%	159	70	43.9%
94112	2219	719	32.4%	2535	697	27.5%	5,683	2,049	36.1%	7,732	3,465	44.8%
94114	1093	120	11.0%	864	189	21.9%	1,546	207	13.4%	1,753	516	29.4%
94115	1116	127	11.4%	635	72	11.3%	1,460	366	25.1%	1,826	565	30.9%
94116	1324	194	14.7%	1293	247	19.1%	2,685	404	15.0%	3,089	845	27.4%
94117	1400	136	9.7%	986	176	17.8%	1,921	331	17.2%	2,252	643	28.6%
94118	1404	110	7.8%	816	79	9.7%	1,859	429	23.1%	2,288	618	27.0%
94121	1509	119	7.9%	878	86	9.8%	1,998	461	23.1%	2,459	666	27.1%
94122	1771	218	12.3%	1670	314	18.8%	3,393	423	12.5%	3,816	955	25.0%
94123	608	145	23.8%	319	57	17.9%	761	248	32.6%	1,009	450	44.6%
94124	1042	434	41.7%	1228	426	34.7%	2,782	1,361	48.9%	4,143	2,221	53.6%
94127	492	121	24.6%	553	113	20.4%	1,236	290	23.5%	1,526	524	34.3%
94129	116	9	7.8%	67	7	10.4%	153	35	22.9%	188	51	27.1%
94130	77	18	23.4%	39	8	20.5%	96	31	32.3%	127	57	44.8%
94131	815	132	16.2%	769	159	20.7%	1,564	280	17.9%	1,844	571	31.0%
94132	715	178	24.9%	809	166	20.5%	1,809	429	23.7%	2,238	773	34.5%
94133	693	165	23.8%	364	64	17.6%	867	283	32.6%	1,150	512	44.5%
94134	1249	521	41.7%	1474	510	34.6%	3,337	1,632	48.9%	4,969	2,663	53.6%
94158	145	21	14.5%	151	39	25.8%	161	76	47.2%	237	136	57.3%

AIR analysis of American Community Survey 5-year estimates (2020 for 0-5 year olds and 2018 for school age children)

APPENDIX
C

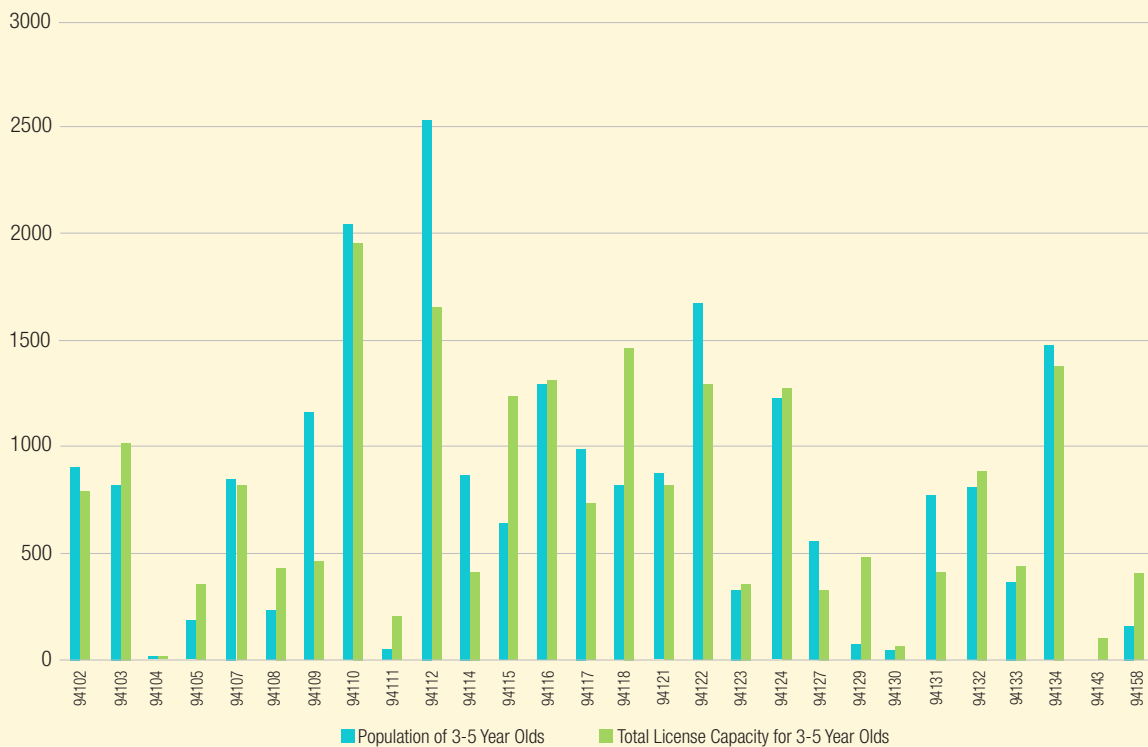
There Is A Significant Unmet Need For Licensed Spaces For Children 0-2 Years Old



Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data. FCC license capacity per age group is based on estimates.

APPENDIX
D

There Are Enough Licensed ECE Spaces For Children 3-5 Years Old Although The Unmet Need Varies Across Zip Codes: Population Versus License Capacity



Source: Children's Council of San Francisco (September 2022) based on DSS Community Care Licensing Division data. FCC license capacity per age group is based on estimates.

The Number Of Children Enrolled In Subsidized
CDE Title 5 Contracted Centers Has Decreased From 2016 To 2022

Zip Code	Neighborhood	0-2 YEARS			3-5 YEARS		
		2016	2022	Difference 2022-2016	2016	2022	Difference 2022-2016
94102	Hayes Valley / Tenderloin	26	25	-1	161	75	-86
94103	South of Market	12	19	7	93	120	27
94104	Financial District	0	0	0	4	0	-4
94105	Downtown	0	0	0	9	2	-7
94107	Potrero Hill	14	4	-10	72	70	-2
94108	Chinatown	6	19	13	64	172	108
94109	Polk / Russian Hill / Nob Hill	14	0	-14	120	47	-73
94110	Inner Mission / Bernal Heights	76	104	28	296	372	76
94111	Embarcadero / Gateway	2	19	17	88	28	-60
94112	Outer Mission / Excelsior / Ingleside	113	50	-63	596	238	-358
94114	Castro / Noe Valley	2	2	0	5	16	11
94115	Western Addition	8	30	22	90	140	50
94116	Parkside / Forest Hill	8	7	-1	97	43	-54
94117	Haight / Western Addition / Fillmore	6	8	2	40	65	25
94118	Inner Richmond / Presidio / Laurel H.	7	0	-7	35	29	-6
94121	Outer Richmond / Sea Cliff	17	24	7	117	55	-62
94122	Sunset	9	4	-5	109	95	-14
94123	Marina / Cow Hollow	1	0	-1	4	18	14
94124	Bayview / Hunters Point	127	98	-29	592	311	-281
94127	West Portal / St. Francis Wood	2	0	-2	13	0	-13
94129	Presidio	2	2	0	5	17	12
94130	Treasure Island	12	2	-10	33	5	-28
94131	Twin Peaks / Diamond Heights / Glen Park	1	0	-1	22	36	14
94132	Stonestown / Lake Merced	8	15	7	70	67	-3
94133	North Beach / Telegraph Hill	20	49	29	155	115	-40
94134	Visitacion Valley	107	107	0	448	161	-287
94158	Mission Bay	3	1	-2	19	0	-19
	Missing / Other / Out of County	30	0	-30	122	0	-122
	Total	633	589	-44	3,479	2,297	-1,182

Number Of Children With CalWORKs Stage 1 Subsidies

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 6-11	Ages 0-12
94102	Hayes Valley / Tenderloin	10	41	21	72
94103	South of Market	13	19	15	47
94104	Financial District	0	0	0	0
94105	Downtown	2	3	2	7
94107	Potrero Hill	3	8	2	13
94108	Chinatown	0	2	0	2
94109	Polk / Russian Hill / Nob Hill	2	13	0	15
94110	Inner Mission / Bernal Heights	12	22	21	55
94111	Embarcadero / Gateway	1	4	6	11
94112	Outer Mission / Excelsior / Ingleside	6	34	19	59
94114	Castro / Noe Valley	0	1	0	1
94115	Western Addition	5	15	10	30
94116	Parkside / Forest Hill	1	1	1	3
94117	Haight / Western Addition / Fillmore	1	4	0	5
94118	Inner Richmond / Presidio / Laurel H.	0	1	3	4
94121	Outer Richmond / Sea Cliff	2	4	2	8
94122	Sunset	0	2	4	6
94123	Marina / Cow Hollow	0	1	3	4
94124	Bayview / Hunters Point	26	64	48	138
94127	West Portal / St. Francis Wood	0	1	0	1
94129	Presidio	0	0	0	0
94130	Treasure Island	3	2	4	9
94131	Twin Peaks / Diamond Heights / Glen Park	1	3	0	4
94132	Stonestown / Lake Merced	1	12	3	16
94133	North Beach / Telegraph Hill	2	3	3	8
94134	Visitacion Valley	11	35	31	77
94158	Mission Bay	0	8	7	15
	Missing/Other/Out of Country	8	11	10	29
	Total	100	273	194	639

Source: Children's Council of San Francisco (March 2022)

Number Of Children With CalWORKs Stage 2 Subsidies

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 6-11	Ages 0-12
94102	Hayes Valley / Tenderloin	0	13	3	16
94103	South of Market	0	8	2	10
94104	Financial District	0	0	0	0
94105	Downtown	0	1	0	1
94107	Potrero Hill	2	3	8	13
94108	Chinatown	0	0	0	0
94109	Polk / Russian Hill / Nob Hill	3	7	4	14
94110	Inner Mission / Bernal Heights	1	13	14	28
94111	Embarcadero / Gateway	0	0	0	0
94112	Outer Mission / Excelsior / Ingleside	3	16	10	29
94114	Castro / Noe Valley	0	0	0	0
94115	Western Addition	0	8	6	14
94116	Parkside / Forest Hill	1	4	2	7
94117	Haight / Western Addition / Fillmore	0	2	2	4
94118	Inner Richmond / Presidio / Laurel H.	0	2	0	2
94121	Outer Richmond / Sea Cliff	0	0	1	1
94122	Sunset	0	1	2	3
94123	Marina / Cow Hollow	0	0	0	0
94124	Bayview / Hunters Point	4	39	32	75
94127	West Portal / St. Francis Wood	0	0	0	0
94129	Presidio	0	0	0	0
94130	Treasure Island	0	1	0	1
94131	Twin Peaks / Diamond Heights / Glen Park	0	3	1	4
94132	Stonestown / Lake Merced	0	5	2	7
94133	North Beach / Telegraph Hill	0	1	1	2
94134	Visitacion Valley	2	15	14	31
94158	Mission Bay	0	2	2	4
	Missing/Other/Out of Country	4	22	3	29
	Total	20	153	106	295

Source: Children's Council of San Francisco (March 2022)

Number Of Children With CalWORKs Stage 3 Subsidies

Zip Code	Neighborhood	Ages 0-2	Ages 3-5	Ages 6-11	Ages 0-12
94102	Hayes Valley / Tenderloin	4	19	22	45
94103	South of Market	3	17	27	47
94104	Financial District	0	0	0	0
94105	Downtown	1	4	10	15
94107	Potrero Hill	4	10	13	27
94108	Chinatown	0	1	4	5
94109	Polk / Russian Hill / Nob Hill	0	7	11	18
94110	Inner Mission / Bernal Heights	2	22	43	67
94111	Embarcadero / Gateway	0	1	3	4
94112	Outer Mission / Excelsior / Ingleside	5	35	53	93
94114	Castro / Noe Valley	0	2	0	2
94115	Western Addition	5	20	19	44
94116	Parkside / Forest Hill	0	2	12	14
94117	Haight / Western Addition / Fillmore	0	1	5	6
94118	Inner Richmond / Presidio / Laurel H.	1	1	6	8
94121	Outer Richmond / Sea Cliff	0	6	13	19
94122	Sunset	2	3	11	16
94123	Marina / Cow Hollow	0	0	0	0
94124	Bayview / Hunters Point	10	68	160	238
94127	West Portal / St. Francis Wood	0	0	1	1
94129	Presidio	0	2	0	2
94130	Treasure Island	0	2	3	5
94131	Twin Peaks / Diamond Heights / Glen Park	1	8	15	24
94132	Stonestown / Lake Merced	3	17	13	33
94133	North Beach / Telegraph Hill	1	10	12	23
94134	Visitacion Valley	12	43	80	135
94158	Mission Bay	0	3	11	14
	Missing/Other/Out of Country	11	37	76	124
	Total	61	322	601	1029

Source: Children's Council of San Francisco (March 2022)

Historic Comparison Of The Number Of Children With Head Start And Early Head Start Subsidies By Age (2012–2022)

Zip Code	Neighborhood	AGES 0-2			AGES 3-5			AGES 0-5		
		2012	2016	2022	2016	2016	2022	2012	2016	2022
94102	Hayes Valley / Tenderloin	1	6	28	14	48	29	15	54	57
94103	South of Market	0	6	23	1	44	37	1	50	60
94104	Financial District	0	0	0	3	2	0	3	2	0
94105	Downtown	0	2	3	2	3	2	2	5	5
94107	Potrero Hill	1	5	6	44	23	8	45	28	14
94108	Chinatown	17	17	17	35	26	30	52	43	47
94109	Polk / Russian Hill / Nob Hill	8	15	16	58	62	49	66	77	65
94110	Inner Mission / Bernal Heights	3	28	28	203	142	91	206	170	119
94111	Embarcadero / Gateway	0	10	28	4	88	22	4	98	50
94112	Outer Mission / Excelsior / Ingleside	12	41	69	182	126	82	194	167	151
94114	Castro / Noe Valley	0	0	0	3	1	1	3	1	1
94115	Western Addition	1	4	4	33	9	13	34	13	17
94116	Parkside / Forest Hill	0	0	5	30	36	45	30	36	50
94117	Haight / Western Addition / Fillmore	3	0	2	10	4	4	13	4	6
94118	Inner Richmond / Presidio / Laurel H.	6	1	2	32	7	6	38	8	8
94121	Outer Richmond / Sea Cliff	5	0	18	61	50	35	66	50	53
94122	Sunset	0	1	2	39	12	4	39	13	6
94123	Marina / Cow Hollow	0	8	0	0	5	0	0	13	0
94124	Bayview / Hunters Point	54	61	60	213	153	82	267	214	142
94127	West Portal / St. Francis Wood	0	2	1	2	1	1	2	3	2
94129	Presidio	0	0	0	0	0	0	0	0	0
94130	Treasure Island	0	4	1	1	4	2	1	8	3
94131	Twin Peaks / Diamond Heights / Glen Park	1	0	2	10	6	2	11	6	4
94132	Stonestown / Lake Merced	3	2	8	31	12	12	34	14	20
94133	North Beach / Telegraph Hill	15	19	26	56	58	55	71	77	81
94134	Visitacion Valley	43	35	34	195	91	60	238	126	94
94158	Mission Bay	0	3	2	0	10	22	0	13	24
	Missing / Other / Out of County	30	0	-30	122	0	-122	24	24	24
	Total	173	270	408	1,262	1,024	704	1,435	1,294	1,112



KEY ECE COMMUNITY ORGANIZATIONS, LEGISLATION, PROGRAMS

GOVERNMENT ADMINISTRATION

Federal

- Head Start & Early Head Start

State

- CDE
- CDSS
- CalWORKs
- First 5 California
- Community Care Licensing

Local

- Child Care Planning & Advisory Council (CPAC)
- Department of Children, Youth and their Families (DCYF)
- Department of Early Childhood (DEC)
- ELS/PFA
- Human Services Agency
- San Francisco Unified School District

Access to Quality Care

- Early Learning SF (ELSF)
- Early Childhood Mental Health Consultation Initiative (ECMHCI)
- San Francisco Inclusion Networks
- West Ed
- DPH Childcare Health Programs
- First 5 Quality Connections
- Resource & Referral Agencies

Facilities

- Child Care Development Impact Fee

Family Supports

- Family Resource Centers

FUNDING STREAMS

Federal Funding Streams

- Child Care and Development Block Grant (CCDBG)
- Child Care and Development Fund (CCDF)
- Temporary Assistance to Needy Families (TANF)

Local Funding Streams

- Child Care Facilities Fund (CCFF)

DESCRIPTION OF KEY COMMUNITY ORGANIZATIONS/PROGRAMS/LEGISLATION

Federal

- **Head Start & Early Head Start:** Support children's growth from birth to 5 through services that support early learning and development, health, and family well-being. Head Start services are available at no cost to children in eligible families. Head Start preschool services work with families with children ages 3 to 5. Early Head Start services work with families with children ages birth to 3. **For more information visit:** <https://www.acf.hhs.gov/ohs>

State

- **California Department of Education (CDE):** The state agency that oversees public education, including funding center-based contracts and vouchers for early care and education subsidies. CDE is the lead agency for the California State Preschool Program (CSPP). For more information visit: <https://www.cde.ca.gov/sp/cd/>



- **California Department of Social Services (CDSS):** The state agency that oversees social welfare programs, including CalWORKs and foster care. CDSS also oversees child care licensing for centers and FCC homes and is the lead agency for the federal Child Care Development Block Grant (CCDBG) funding for child care and development programs. **For more information visit:** <https://www.cdss.ca.gov/inforesources/child-care-and-development>
 - **California Work Opportunity and Responsibility to Kids (CalWORKs):** A public assistance program that provides cash aid and services to eligible families that have children in the home. The program serves all 58 counties in the state and is operated locally by the San Francisco Human Services Agency. For more information: <https://www.cdss.ca.gov/CalWORKs>
- **First 5 California:** Provides funding and supports for early education and health programs, services, and resources for children prenatal through age 5 and their families. First 5 California oversees and distributes funds to the 58 county commissions, which determine what programs they will use in their specific communities. **For more information visit:** <https://www.first5california.com>
- **Community Care Licensing:** As part of the California Department of Social Services, CCL administers licensing for centers and FCC homes. **For more information visit:** <https://www.cdss.ca.gov/inforesources/child-care-licensing>

Local

- **Child Care Planning & Advisory Council (CPAC):** The local Child Care Planning Council mandated by state to complete local needs assessments, set local priorities and make recommendations about early care and education funds. For more information visit: <https://sfcpac.org>
- **Department of Children, Youth and their Families (DCYF):** The San Francisco City & County department that invests in children, youth, transitional age youth, and their families. For more information visit: <https://www.dcyf.org/>
- **Department of Early Childhood (DEC):** The Office of Early Care & Education (OECE) and First 5 San Francisco merged in 2022 to form the Department of Early Childhood. DEC oversees early care and education services in San Francisco. For more information visit: <https://sfdec.org/>
 - **Early Learning San Francisco (ELS):** ELS provides financial assistance to pay for quality ECE to eligible San Francisco families with children 0-5 years old. ELS programs are funded by DEC and prioritize quality and continuity of care for children. For more information visit: <https://sfoece.org/how-to-pay-for-ece/> or <https://sfoece.org/join-els/>
 - **Preschool for All (PFA):** The Preschool for All Tuition Credit (PFA) program helps provide universal access to preschool to all 4-year-olds in San Francisco. PFA is open to all families regardless of need or income. For more information visit: <https://sfoece.org/how-to-pay-for-ece/>



- **Human Services Agency:** The San Francisco City/County agency that oversees social services locally. For more information visit: <https://www.sfhsa.org/>
- **San Francisco Unified School District:** The local education agency (LEA) that administers K-12 school programs, as well as Transitional Kindergarten and many early care and education programs. For more information visit: <https://www.sfusd.edu/>

Access to Quality Care

- **Early Learning SF (ELSF):** An online portal that connects families to ECE programs and programs to families who match their program preferences. ELSF is managed by DEC in partnership with Children's Council, Wu Yee and Compass Family Services. For more information visit: <https://www.earlylearningsf.org>
- **Early Childhood Mental Health Consultation Initiative (ECMHCI):** A collaborative of mental health organizations that provide consultation to child care programs to improve the social and emotional well-being of children and the people who care for them.
- **San Francisco Inclusion Networks:** A professional development program aimed at building capacity in ECE settings to provide high quality, evidence-based, developmentally appropriate inclusive practices.
- **West Ed:** A research, development, and service agency working with education and other communities to achieve equity and improve learning for children, youth, and adults. For more information visit: <https://www.wested.org/>
- **San Francisco Department of Public Health Child Care Health Program:** Provides Health and safety consultation, screening, training, and disaster preparedness for childcare providers and families in targeted San Francisco neighborhoods. For more information visit: <https://www.sfdph.org/dph/comupg/oprograms/MCH/CCHP.asp>
- **First 5 Quality Connections:** Provides a framework, standards, and quality improvement supports for early learning programs. For more information visit: <http://qualityconnections.first5sf.org/>
- **Resource and Referral Agencies:** Resource and referral agencies provide parents and providers with information about affordable, quality child care. San Francisco has two resource and referral agencies: Children's Council of San Francisco and Wu Yee Children's Services.
 - **Children's Council:** <https://www.childrenscouncil.org/>
 - **Wu Yee:** <https://www.wuyee.org/>



Facilities

- Child Care Development Impact Fee: <https://www.liifund.org/>

Family Supports

- Family Resource Centers (FRCs): San Francisco has 26 FRCs that provide wraparound services including workshops and classes on child and youth development, family mental health supports, referrals and comprehensive case management.

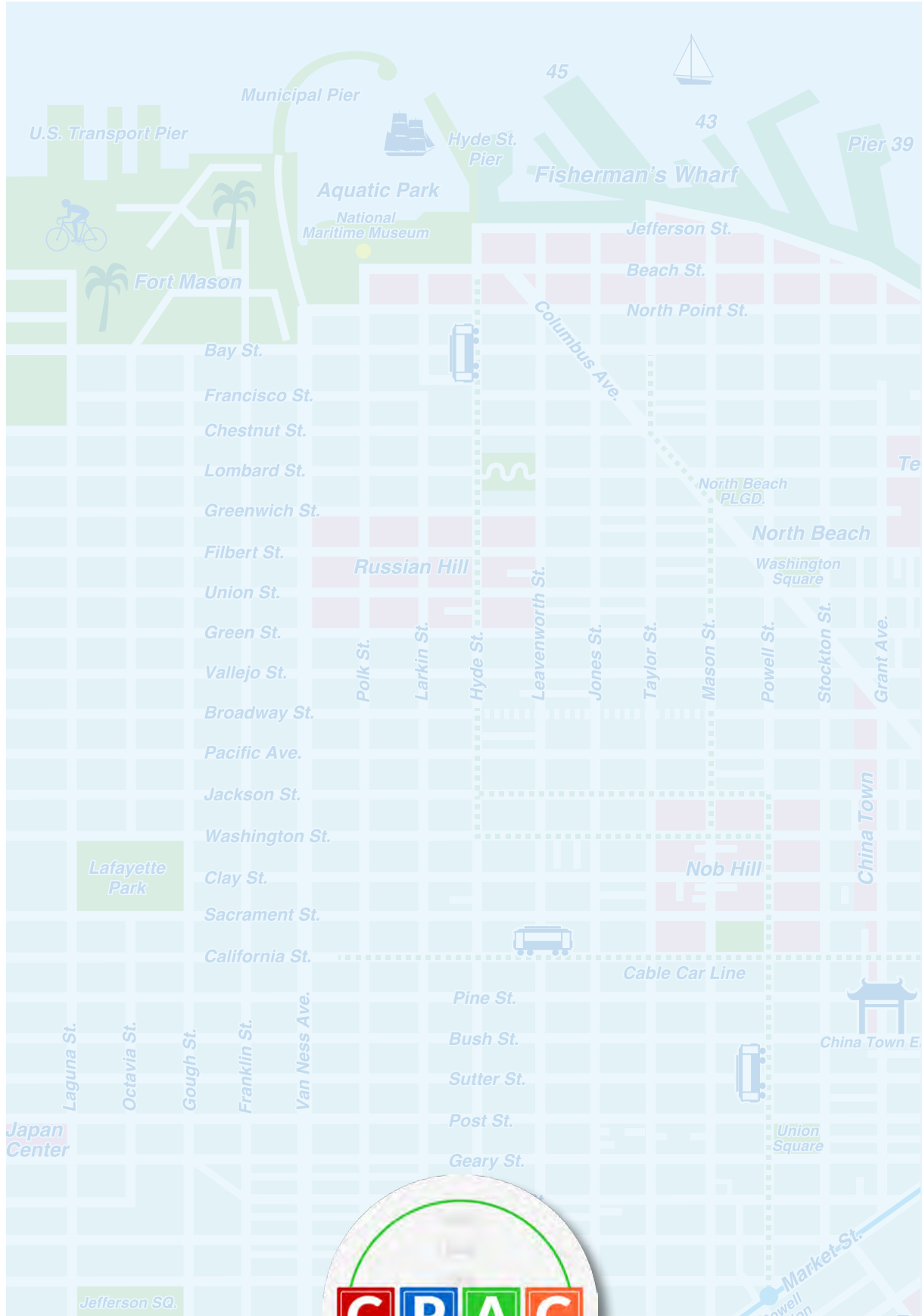
FUNDING STREAMS

Federal Funding

- **Child Care and Development Block Grants (CCDBG):** Provide flexible federal funding to states for child care subsidies for low-income families.
- **Child Care and Development Fund (CCDF):** Combines funding from Child Care and Development Block Grant (CCDBG) and several other early care and education programs to assist low income families, families receiving temporary public assistance, and those transitioning from public assistance to obtain early care and education so they can work or attend training/education.
- **Temporary Assistance to Needy Families (TANF):** A federal funding stream that provides block grants of aid to enable states to provide time-limited cash assistance and work support services to low income families with children. For more information visit: <https://www.acf.hhs.gov/ofa/programs/temporary-assistance-needy-families-tanf>

Local Funding

- Child Care Facilities Fund (CCFF): CCFF uses flexible capital, grants, group trainings and technical assistance to create, enhance and preserve quality child care spaces and facilities in the City and County of San Francisco. For more information visit: <https://www.liifund.org/products/grants/grants-for-child-care/ccff/> to the low number of reports in those categories.



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